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THE National Food SITUATION

BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

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SUMMARY

Civilian per capita consumption of food in the United States this year is expected to continue at about the 1948 level which was 12 percent above the prewar average. Retail food prices are likely to average somewhat lower in 1949 than in the past year when they set a new high. No sharp decline is anticipated.

Somewhat larger supplies of livestock products will be available than in 1948 with the increases coming in the latter part of the year. More pork will be available for consumption in 1949 but less of the other meats. Poultry consumption in 1949 will average about the same as 1948, for the year as a whole, with smaller supplies during the first half of the year offset by larger supplies later in the year. Consumption of eggs and of the major dairy products also will be about the same as in the year 1948. More fats and oils will be available because of the record output of vegetable oils in 1948-49.

Civilian consumption per capita of butter, cereal products, dried fruits, potatoes and sweetpotatoes is expected to continue this year below the average for 1935-39. However the consumption of other individual foods will continue well above the prewar rate.

Food consumption by civilians in the United States in 1948 was down 3 percent from the previous year's rate, but still substantially above the 1935-39 average. Retail food prices during the past year hit record highs principally because of the continued strong domestic demand for food.

Most of the decline in consumption from the 1947 rate was the result of smaller supplies of livestock products. The production of all types of meat was lower, as was the output of milk, poultry and eggs.

On a per capita basis, United States civilians consumed more cheese, condensed and evaporated milk, fishery products, fats and oils other than butter, fresh vegetables, dry edible beans, canned fruit juices, and sugar than in 1947. Consumers got about the same quantities of eggs, dried fruit, treenuts, rice, and barley and oat products. However, per capita consumption was smaller for meat, chicken and turkey, fluid milk and cream, butter, ice cream, most fresh and processed fruits, most processed vegetables, potatoes, sweetpotatoes, and wheat, rye and corn products.

Exports of food during the year were again very large. However, a somewhat smaller part of the nation's food supply was exported in 1948 than in 1947.

Table 1.-Volume of agricultural production for sale and for farm home consumption and civilian per capita food consumption, 1945-47 and preliminary estimates for 1948, with percentage comparisons

(Index numbers, 1935-39 = 100)

Item	1943	1944	1945	1946	1947	1948 Prel. 1/	1948 as a percentage of 1947
Food grains 2/	116	148	155	164	197	184	93
Truck crops 3/	124	137	142	158	141	142	101
Fruits and nuts 4/	108	123	112	133	126	123	98
Vegetables, excluding truck crops 5/	125	106	110	128	108	122	113
Sugar crops 6/	81	81	94	103	110	89	81
Total food crops 7/	116	129	130	145	147	144	98
Meat animals 8/	150	155	147	145	144	135	94
Poultry 9/	152	153	163	153	150	148	99
Dairy products 10/	113	115	119	120	120	117	98
Total food livestock	138	141	141	138	137	132	96
Food production	133	138	138	140	140	135	96
Agricultural production, food and non-food	128	136	133	136	136	138	101
Civilian per capita food consumption	109	112	114	118	116	112	97

1/ Production estimates are based on the December crop report and estimated marketings and home consumption of livestock and livestock products for the calendar year 1948.
2/ Includes wheat, rye, rice, and buckwheat.
3/ Includes truck crops for market (artichokes, asparagus, lima beans, snap beans, beets, cabbage, cantaloups, carrots, cauliflower, celery, cucumbers, eggplant, lettuce, onions, peas, peppers, spinach, tomatoes, and watermelons) and truck crops for processing (asparagus, lima beans, snap beans, beets, cabbage, sweet corn, cucumbers, peas, spinach, and tomatoes).
4/ Includes apples, peaches, pears, cherries, apricots, grapes, strawberries, cranberries, oranges, grapefruit, lemons, olives, dried California figs, fresh and dried plums, almonds, pecans, and walnuts.
5/ Includes dry edible beans, potatoes, sweetpotatoes.
6/ Includes sugar beets, sugarcane for sugar, sugarcane sirup, sorgo sirup, maple sugar, and maple sirup.
7/ Includes peanuts in addition to the other crops.
8/ Includes cattle and calves, sheep and lambs, and hogs.
9/ Includes eggs, chickens, turkey, and broilers.
10/ Includes wholesale milk, retail milk, butterfat, farm butter, and farm consumption of dairy products.

Table 2 - Total food disappearance: Source and distribution, 1935-39 average and annual 1940-48 1/

Year	Total food disappearance	Source of total food: Food production	Imports	Reduction in stocks	Increase in stocks	Distribution by claimants: Civilian	Military, including military civilian feeding	Department of Agriculture 2/: Net purchases	Deliveries	Reduction in stocks	Increase in stocks	Commercial exports and shipments 3/
						Percentage of food disappearance in each year						
1935-39 Av.	100.0	93.7	6.4		.1	97.4						2.6
1940	100.0	94.9	5.5		.4	97.8						2.2
1941	100.0	94.7	5.8		.5	94.0	1.9	2.6	2.4		.2	1.5
1942	100.0	94.0	3.8	2.2		86.6	6.2	6.2	4.7		1.5	1.0
1943	100.0	95.7	4.8		.5	81.0	9.9	7.9	7.0		.9	1.2
1944	100.0	94.0	4.8	1.2		78.3	12.9	6.6	7.1	.5		2.2
1945	100.0	94.3	4.9	.8		81.8	12.2	4/4.0	4.8	.8		2.0
1946	100.0	96.4	4.1		.5	89.8	3.4	4/4.3	5.3	1.0		2.5
1947	100.0	95.9	4.8		.7	89.7	3.1	4/2.7	2.6		.1	4.5
1948 Prel.	100.0	95.0	4.9	.1		91.3	3.7	4/2.0	2.1	.1		3.0
						Percentage of 1935-39 food disappearance						
1935-39 Av.	100.0	93.7	6.4		.1	97.4						2.6
1940	109.7	104.1	6.0		.4	107.2						2.5
1941	113.8	107.8	6.6		.6	106.9	2.2	3.0	2.7		.3	1.7
1942	124.6	117.2	4.7	2.7		107.9	7.7	7.7	5.8		1.9	1.3
1943	130.3	124.7	6.3		.7	105.7	12.8	10.3	9.2		1.1	1.5
1944	137.5	129.3	6.6	1.6		107.7	17.7	9.1	9.7	.6		3.0
1945	137.1	129.3	6.8	1.0		112.3	16.7	4/5.4	6.5	1.1		2.7
1946	136.2	131.2	5.6		.6	122.3	4.6	4/5.9	7.2	1.3		3.4
1947	136.8	131.2	6.5		.9	122.7	4.2	4/3.7	3.6		.1	6.2
1948 Prel.	133.1	126.5	6.5	.1		121.6	5.0	4/2.6	2.7	.1		3.9

1/ The upper section of the table divides the total disappearance in each year (1) according to the source of the food, and (2) according to its distribution. Both the total disappearance figure and the breakdown are on an index number basis, that is, they represent quantities weighted by average farm prices in the period 1935-39. The disappearance figure includes both domestically produced and imported foods. The lower portion of the table contains the same data expressed as a percentage of total food disappearance in 1935-39 instead of total disappearance in each year. 2/ The quantities assigned to the Department of Agriculture are principally food for lend-lease and relief. These quantities are measured in two ways: (1) in terms of Department of Agriculture purchases from commercial channels, and (2) in terms of shipments out of the country. When measured in terms of purchases, additions to Department of Agriculture stocks included. When measured in terms of shipments, additions to stocks are shown separately. When Department of Agriculture shipments were smaller than the total quantities purchased, stocks were built up, and vice versa. 3/ The 1935-39, 1940-41 exports and shipments are strictly commercial. For the war years, they approximate the commercial portion as indicated by total exports and shipments less the exports assignable to the Department of Agriculture.
4/ Including transfers for relief from military stocks in U. S.

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RETAIL FOOD PRICES

Review of 1948

Retail food prices in 56 cities were a record high in 1948, according to surveys made by the Bureau of Labor Statistics. For the year, they averaged 210 percent of the 1935-39 base period, more than 8 percent above 1947. During the latter part of 1948 there were some indications of a slackening in the demand for food.

The index of retail food prices declined almost 4 percent between January and March 1948. Beginning in April, increases were recorded in every succeeding month until the peak of 217 was reached in July. The peak level was held in August, but thereafter the index began to decline. During the last half of the year, the retail food price index fell about 5 percent.

The retail price for most reported food commodities averaged higher in 1948 than a year earlier. The meat group was 14 percent higher; beverages, cereals and bakery products, and dairy products were each up 10 percent; fresh fruits and vegetable, 5 percent higher; eggs up 4 percent. However, declines were reported for 4 food groups: canned fruits and vegetables, down 5 percent; dried fruits, 6 percent; fats and oils, 1 percent; and sugar and sweets, 3 percent.

The high level of retail food prices in 1948 was the result of the interplay of many factors, the most significant of which was domestic consumer demand for food. Consumer expenditures in general leveled off during the early part of the year. However, the direction was reversed in the spring months of the year by the third round of wage increases and the reduction in personal income taxes, which increased consumer incomes and expenditures, and by larger Government appropriations for national defense and for foreign aid. For 1948 as a whole, the backlog of consumer demand for many non-food commodities was partly satisfied, and, with disposable personal income continuing high, individuals paid record high prices for a slightly smaller quantity of food than in 1947.

Food exports in 1948 continued high. With a significant improvement in food output abroad as compared with 1947, the foreign demand for foods produced in the United States was less urgent than in recent years. The bulk of the exports was high-calorie, low-cost foods such as grain and grain products.

Prospects for 1949

Retail food prices in 1949 probably will average somewhat lower than last year, but no sharp decline is anticipated. No major change in food supplies is expected and the factors affecting the general level of purchasing power -- i.e., general economic activity, employment, and wage and salary payments -- probably will continue strong throughout the year.

The increase in government outlays projected in the President's Budget Message, if appropriated by the Congress, will be large enough to offset a moderate decline in private spending and still maintain overall economic activity close to present levels. Actual expenditures for food under the European Recovery Program and other foreign aid programs are expected to be larger in calendar 1949 than a year earlier. They are likely to maintain important outlets for some farm products.

Table 3.-Apparent civilian consumption of major food commodities on a per capita basis, calendar years, 1935-39 average, 1945, 1946, 1947, 1948 and forecasts for 1949 with percentage comparisons 1/
(Primary distribution weight)

Commodity	Average 1935-39	1945	1946	1947	1948 Prel.	Forecasts for 1949	1949 as a percentage of 1935-39	1949 as a percentage of 1948
	Pounds	Pounds	Pounds	Pounds	Pounds	Pounds		
Meats (dressed weight) - Total	126.2	144.4	153.4	155.0	146.0	145	115	99
Beef	55.2	59.0	61.3	69.1	63.4	61	111	96
Veal	8.1	11.8	9.9	10.7	9.4	8.6	106	91
Lamb and mutton	6.8	7.3	6.6	5.4	5.0	4.3	63	86
Pork (excluding lard)	56.1	66.3	75.6	69.8	68.2	71	127	104
Fish (edible weight) - Total	11.1	10.6	11.0	10.8	11	2/	-	-
Fresh and frozen	5.3	7.1	6.2	6.2	6.5	2/	-	-
Canned 3/	4.8	2.6	3.8	3.8)	4.5	2/	-	-
Cured	1.0	.9	1.0	.8)				
Poultry products								
Eggs 4/	37.3	49.6	46.8	47.5	48.6	47.5	127	98
Chicken (dressed weight)	17.9	28.8	25.4	23.4	22.7	23	128	101
Turkey (dressed weight)	2.6	4.3	4.5	4.5	3.5	3.8	146	109
Dairy products								
Total milk (whole milk equivalent)	801	794	809	791	755	750	94	99
Cheese	5.5	5.9	6.9	6.8	6.9	7.0	127	101
Condensed and evaporated milk	16.7	18.3	18.8	20.3	20.6	20.9	125	101
Fluid milk and cream	340	432	420	400	388	370	109	95
Fats and oils - Total, fat content 5/	44.7	39.5	39.6	41.8	42.2	43.5	97	103
Butter, farm and factory (actual weight)	16.7	10.8	10.3	11.2	10.1	10.6	63	105
Lard	11.0	11.5	11.8	12.6	12.7	12.8	116	101
Margarine (actual weight)	2.9	4.0	3.8	5.0	6.1)			
Shortening	11.7	10.0	10.1	9.3	9.5)	23	110	102
Other edible fats and oils	6.3	6.0	6.3	6.9	6.9)			
Fruits								
Fresh - total	137.7	143.6	140.4	145.6	134.0	133	97	99
Citrus	48.9	65.3	58.2	61.9	54.0	52	106	96
Apples (Commercial)	30.4	22.9	23.1	25.2	25.3)	81	91	101
Other (excluding melons)	58.4	55.4	59.1	58.5	54.7)			
Processed								
Canned fruit	14.9	14.8	21.3	18.3	18.2	2/	-	-
Canned juices	3.8	10.7	17.6	16.3	17.8	2/	-	-
Frozen	.8	2.3	3.1	3.2	2.9	2/	-	-
Dried	5.8	5.9	4.5	4.2	4.3	2/	-	-
Vegetables								
Fresh	235	265	270	251	256	256	109	100
Canned	29.9	42.8	46.3	39.9	38.3	2/	-	-
Frozen	6/ .4	1.7	2.0	2.6	2.4	2/	-	-
Potatoes	131	125	127	123	118	2/	-	-
Sweetpotatoes	21.4	18.7	17.8	15.8	14.0	2/	-	-
Dry edible beans	8.8	7.7	8.6	8.4	8.9	2/	-	-
Sugar (refined)	96.5	73.5	74.6	91.8	96	90-95	96	96
Grains								
Corn products:								
Corn meal	22.9	19.9	16.7	17.1	16.5	17	74	103
Corn sirup	7.7	13.7	12.5	13.2	8.5	11	143	129
Corn starch	1.3	1.8	1.8	1.9	1.5	1.7	131	113
Corn sugar	2.7	3.8	3.8	4.5	4.0	4.5	167	113
Breakfast cereals	1.7	2.5	2.2	2.6	2.4	2.5	147	104
Hominy	1.2	1.7	1.5	1.8	1.7	1.7	142	100
Oatmeal	3.9	4.1	4.3	3.9	4.0	4.0	103	100
Barley food products 7/	1.2	1.5	1.8	1.8	1.7	1.8	150	106
Wheat:								
Flour 8/	152	159	152	142	136	136	89	100
Breakfast cereals	3.7	3.7	3.5	3.5	3.5	3.5	95	100
Rye flour	2.2	2.6	1.9	1.7	1.6	1.6	73	100
Rice, milled	5.6	4.7	4.1	4.9	4.8	4.8	86	100
Beverages								
Coffee 9/	14.0	16.3	19.9	17.3	18.4	17.5	125	95
Tea	.67	.59	.53	.57	.5	2/	-	-
Cocoa beans	4.4	4.0	4.1	4.1	4	2/	-	-
Peanuts (shelled)	4.4	6.4	5.0	4.6	4.6	2/	-	-

Population estimes used to obtain per capita consumption figures are official Census estimates of total population adjusted for underenumeration of children under 5 and for military personnel not eating out of civilian supplies.
1/ Data on calendar year basis except for dried fruits which are on a pack year basis; fresh citrus fruits and peanuts on a crop year basis, rice on August 1 year. All years begin in year indicated except for fresh citrus, which begins in October of the previous year and rice which begins in August of previous year. 2/ Not available. 3/ Excludes canned food products containing small quantities of fish such as clam chowder, etc. 4/ In terms of number of eggs, the apparent per capita consumption was 298 in 1935-39, 397 in 1945, 374 in 1946, 380 in 1947, 388 in 1948 and 380 forecast for 1949. 5/ Computed from unrounded data. 6/ Average 1937-39. Data prior to 1937 are not available. 7/ All barley food products in terms of malt equivalent. 8/ Includes white, whole wheat, and Semolina flour. 9/ Green bean basis.

NUTRITIONAL REVIEW 1/

With domestic food consumption per capita expected to continue in 1949 at approximately the 1948 rate, the changes in the available supplies of major nutrients will be relatively small. Shifts in the consumption of individual commodities will have some effect on the supplies of individual nutrients. Of considerable importance from the nutrition standpoint, is the effect of the continued decline in the consumption of fluid milk which will reduce the available supplies of calcium and riboflavin for the fourth year in succession. The small increase expected in the consumption of visible fats, including fat cuts of pork, will offset the slight decrease in food energy supplied by dairy products other than butter.

Supplies of major nutrients available for consumption in 1948 were somewhat smaller than in the preceding year. The reductions in thiamine, iron, and niacin resulted principally from lower consumption of cereal products and meat.

Table 4.- Nutrients available for civilian consumption per capita per day, calendar years, 1935-39 average, 1945 to 1948 and forecasts for 1949, with percentage comparisons 1/

Nutrients	Units	Average 1935-39	1945	1946	1947	1948 Prel.	1949 Forecast	1949 as a percentage of 1935-39	1949 as a percentage of 1948
Food energy	Cal.	3,250	3,370	3,380	3,380	3,300	3,310	102	100
Protein	Grams	89	103	100	98	96	94	106	98
Fat	Grams	132	138	145	142	141	142	108	101
Carbohydrate	Grams	428	428	418	425	414	414	97	100
Calcium	Grams	.90	1.08	1.12	1.07	1.05	1.03	114	98
Iron	Mg.	13.8	19.0	18.7	18.1	17.2	17.4	126	101
Vitamin A value	I.U.	8,100	9,800	9,300	8,700	8,700	8,800	109	101
Thiamine	Mg.	1.54	2.24	2.27	2.14	2.07	2.09	136	101
Riboflavin	Mg.	1.86	2.55	2.56	2.43	2.37	2.34	126	99
Niacin	Mg.	15.4	21.9	21.5	20.5	19.7	19.5	127	99
Ascorbic acid	Mg.	115	139	136	130	128	127	110	99

1/ Data computed by the Bureau of Human Nutrition and Home Economics on the basis of estimates of apparent civilian consumption (retail basis) including estimates of consumption from urban gardens, supplied by the Bureau of Agricultural Economics. No deductions have been made in the nutrient estimates for the loss or waste in the home or for the destruction or loss of nutrients during the preparation of food. Deductions have been made for inedible refuse. The data for iron, thiamine, riboflavin, and niacin include the amounts of these nutrients added to white bread and flour under the enrichment program. The 1947, 1948, and 1949 estimates assume that voluntary enrichment continues at the rate required under WFO-1.

1/ Prepared in cooperation with the Bureau of Human Nutrition and Home Economics.

COMMODITY REVIEWS

Meat

Review of 1948

Consumption of meat by U. S. civilians in 1948 was about 146 pounds per capita, almost 9 pounds less than the 155 pounds -- a 39 year record qunatity -- consumed in the preceding year. The lower consumption rates were due to the fact that less of each kind of meat was produced in 1948 than a year earlier. The reduced output of pork and of grain-fed beef and lamb resulted from the smaller corn crop harvested in the fall of 1947. The total output of beef, veal, lamb and mutton was below the 1947 level because of the decline in the livestock numbers over the past several years.

Imports and the withdrawal of meat from storage added slightly to the total supplies available for consumption during 1948. Cold storage holdings of meat on January 1, 1949 were 40 million pounds below the holdings of a year earlier. Meat imports were larger than in 1947, when they totaled only 65 million pounds, carcass weight equivalent. Much of the increase came after Canada lifted its export embargo in August.

Exports of meat from the United States were lower than in 1947, amounting to 0.7 percent of available supplies. Throughout 1948 meat exports were controlled under an export licensing system.

During the summer months of 1948, supplies of meat were short relative to demand. Retail prices advanced rapidly. Prices rose to a new high in each succeeding month from May until August when they were 269 percent of the 1935-39 average. However, during the fall, prices declined rapidly. In December, retail meat prices were 235 percent of the 1935-39 average, or 13 percent below the record level reached in August. However, while meat prices in December were lower than in the seven preceding months, they were higher than in any month prior to May 1948, with the single exception of September 1947.

The price decline during the fall months was greater than seasonal and, in part, represented a readjustment of demand which was unusually strong at mid-year. In late 1948, demand for meat relative to consumer incomes apparently was about the same as it had been a year earlier.

Prospects for 1949

A moderate seasonal reduction in meat output is now occurring. Total production in the first quarter of 1949 probably will be a little less than in the same period a year earlier. Beginning in the spring, however, meat output is expected to exceed the corresponding 1948 level and the total for the year may be slightly larger.

Increases in production in 1949 over the preceding year's total will be entirely in pork and better grades of beef. The increased supply of grain-fed cattle this year, which is indicated by the record grain feeding reported in January, will not offset the reduced slaughter of other cattle. Production of lamb and mutton will be lower in 1949. The expansion in pork output will result from the larger pig crop of last fall and an expected increase in the pig crop this spring. Last December, farmers reported that they intended to keep 14 percent more sows for farrowing this spring than last.

U. S. civilian per capita consumption of meat in 1949 probably will be about the same as in 1948. An increase in the civilian population is expected to offset the increase in meat output.

If demand for meat relative to incomes remains at its present levels, retail meat prices may strengthen moderately in the next month or two. Price fluctuations through the remainder of the year may conform more closely to the usual seasonal pattern than they did last year. That is, they may rise during the low production period in the summer months and decline in the peak slaughter period of the fall season. However, prices are not likely to rise as much this summer as they did in the summer of 1948.

Fish 1/

Review of 1948

Civilian consumption of fishery products in the United States in 1948 is estimated at 11 pounds (edible basis) per capita, slightly above the previous year's rate. Consumer demand was fairly strong throughout the year, however, in the last 3 months with large supplies available, consumers evidently were becoming more selective in their purchases of the various species of fresh and frozen fish. Even though retail prices declined slightly during the fall months, they averaged for the year almost 9 percent above the 1947 level.

Preliminary data indicate that the total quantity of fish landed in the United States and Alaska in 1948 for food and non-food uses probably were not much larger than a year earlier. Commercial freezings of fish in continental United States for human consumption were more than 35 million pounds larger than the 1947 level of 205 million pounds. The major portion of the increase was due to heavy freezings of rosefish fillets, which were about 25 million pounds greater than in 1947. Cold storage stocks of frozen fish on January 1, 1949 were almost 20 percent higher than the total of 123.5 million pounds in storage a year earlier.

The canned fish pack in the United States and Alaska is estimated at more than 750 million pounds, about the same as the preceding year's output. Canned salmon production was the second lowest since 1921, but the output of Maine sardines and tuna in 1948 was the largest in history. Pilchard production was more than 60 percent above the 1947 pack. Packers' stocks of canned fish on January 1, 1949 were small.

1/ Prepared in cooperation with the Fish and Wildlife Service, Department of the Interior.

The United States foreign trade transactions during 1948 followed the pattern anticipated earlier in the year. Exports, particularly of canned salmon and pilchards, were very small because the major canned fish importing countries preferred to reserve their limited dollar exchange resources for machinery and equipment, and high-calorie, low-cost foods. On the other hand, imports of fish were very large. Groundfish and rosefish fillets imports -- most of which came from Canada and Newfoundland -- totaled more than 53.6 million pounds, an increase of about 63 percent above the 1947 level. Except for 1943 and 1947, imports of groundfish and rosefish fillets have increased each year since 1939, when they amounted to 9.4 million pounds.

Prospects for 1949

Consumption of fishery products by United States civilians in 1949 is expected to be maintained at a high rate; however, retail prices are likely to average somewhat lower than the level prevailing in the latter part of 1948. Cold storage stocks on January 1 appear to be sufficient to meet the domestic needs until commercial fishing operations pick up seasonally in the spring. Year-end stocks of canned fish at the packer level were low; however, holdings at the wholesale and retail distribution levels are believed to be sufficient for consumer needs until the marketing of the 1949 pack begins.

The international trade of the United States in fishery products is expected to be a repetition of 1948. The relative shortage of dollar exchange and the strong desire of foreign countries for capita goods are expected to be major obstacles to any expansion of exports of fishery products. At the same time, if large amounts of fish are caught by surplus producing countries, the quantity of fish -- especially fresh and frozen groundfish and rosefish fillets -- shipped to the United States may be larger than in 1948.

Poultry and Eggs

Review of 1948

Civilian consumption of eggs in the United States was again high during 1948, only slightly lower than the record of 397 eggs per person consumed in 1945. Although farm flocks averaged 2.5 percent smaller during the year, the rate of lay was high enough to bring farm egg production up to 4,621 million dozen, slightly above 1947. Commercial stocks at the end of the year were the second smallest on record. The demand for eggs remained strong throughout most of the year and the Department of Agriculture found it necessary to purchase the equivalent of 85 million dozen under price support programs to maintain farm egg prices at 90 percent of parity. In 1947 the Department purchased the equivalent of 268 million dozen under price support and special export programs. Farm and retail prices in 1948 averaged the highest on record.

The per capita consumption of chicken and turkey in 1948 was 22.7 and 3.5 pounds, respectively, slightly lower than in the preceding year. These declines were the result of reduced supplies. Short feed supplies brought unfavorable product-feed price relationships during late 1947 and early 1948,

and resulted in smaller numbers of farm chickens and turkeys being raised in 1948. Commercial broiler production, while of near-record proportions, only partly offset the decline in farm chickens raised. Supplies of chicken remaining in storage at the end of the year totaled 107 million pounds, the lowest in 11 years. Turkey stocks were 39 percent smaller than a year earlier. Farm and retail prices for chickens and turkeys in 1948 were the highest on record with consumer demand for poultry continuing strong.

Prospects for 1949

Current indications are that civilian per capita consumption of eggs in 1949 is likely to remain at about the 1948 level. Egg production in total may be slightly larger than in 1948. Farm and retail prices in the early part of the year are expected to be about the same as in the comparable period of 1948 but they may be lower later in the year than in 1948.

Despite the fact that the number of potential layers on farms January 1, 1949 was 3 percent smaller than a year earlier, a continued high rate of lay and lighter culling of laying flocks in early 1949 is likely to result in farm egg production during the first half of the year about as large as in the same period of 1948.

Consumer supplies of fresh shell eggs during the first quarter of 1949 are seasonally higher than the last 3 months of 1948, but about as large as a year earlier. Retail prices are expected to decline seasonally to about the same level as in the spring months of 1948.

Consumer supplies of chicken during the first half of 1949 are expected to be smaller in total than a year earlier. For the year as a whole, however, civilian consumption of chicken is expected to be slightly larger than in 1948. Shorter supplies of heavier chickens are expected in early 1949 because of the smaller quantities in cold storage on January 1 -- the lowest since the beginning of 1939 -- and the prospect of smaller marketings from farm flocks than in the same period of 1948. However, the anticipated record marketings of commercial broilers during the first quarter of 1949 are likely to more than offset the reduction in storage stocks of lighter chickens.

Retail prices for lighter chickens during the next few months will decline, while prices for heavier birds are likely to remain fairly steady. For the year 1949, retail prices probably will average below those of the preceding year. Most of the decline from the 1948 level is expected ot occur in the latter half of the year when volume movement of the larger number of farm chickens expected to be raised in 1949 will be under way.

Supplies of turkeys during the early part of the year will be smaller than in the same period of 1948 and retail prices are expected to continue high. The movement of turkeys into storage from October to the end of the year was substantially smaller than in the same period a year earlier. Stocks on January 1, 1949, amounting to 51 million pounds, were the lowest since 1944. However, turkey consumption in 1949 probably will be somewhat higher than in the preceding year.

Production of turkey is expected to be larger than in 1948. Farmers' intentions as of January 1 to purchase poults indicate that the 1949 crop may be 25 percent larger than that in the previous year. However, volume marketings of the new crop will not begin until the last quarter of the year.

Retail prices for turkeys are expected to average lower than in 1948, with most of the decline coming late in 1949.

Dairy products

Review of 1948

Apparent civilian disappearance of dairy products in 1948 was 755 pounds (whole milk equivalent) per capita, below the rate of a year earlier and also the 1935-39 average of 801 pounds. The decline from a year earlier, however, was largely confined to fluid milk and cream, butter and ice cream. Fluid milk and cream consumption at 388 pounds was only slightly below the 1947 rate of 400 pounds but still well above the prewar average per person of 340 pounds. Butter consumption declined one pound per person to a rate of 10 pounds. Civilian takings of cheese and both condensed and evaporated milk were 6.9 and 20.6 pounds per capita, respectively. These were higher than the previous year's rate, and well above the prewar consumption.

Farm milk production in 1948 was 116.2 billion pounds, compared with 119.4 the year before and the 1935-39 average of 104 billion pounds. The continued decline in the number of dairy cows on farms was only partly offset by the higher milk yield per cow.

Average retail prices for dairy products were the highest on record in 1948, even though two unusual price changes occurred. The year began with low storage reserves and smaller output on farms. This condition balanced against the strong storage and consumer demand resulted in prices going up during the late spring when they usually decline. By mid-year, stocks of most dairy products had been replenished to the levels of the previous year, and by fall commercial stocks of evaporated milk were at a record level. During the latter half of the year there was a sharp contraseasonal price decline. This price change reflected a channeling of milk from fluid use into manufactured dairy products, a weakening in the desire to hold the stocks of manufactured dairy products which had been accumulated earlier in the year, and sharp declines in the prices of the oils used in the production of margarine. Prices declined more at the producer and wholesale level than at retail. This was particularly pronounced for evaporated milk.

Monthly surveys of the Bureau of Labor Statistics indicate that the 1948 retail price of fluid milk, butter and cheese in 56 cities averaged about 10 percent above the corresponding level of 1947, and evaporated milk about 13 percent higher. For butter, the reported price reached a peak in April and then declined in each succeeding month of 1948. The evaporated milk price increased in almost every month through September, and then began to fall. Cheese prices rose between April and August, and declined thereafter.

The total movement of dairy products out of the country was less for all items than a year earlier even though substantial quantities moved under government financed programs. In terms of whole milk equivalent, exports in 1948 were about 3,000 million pounds compared with more than 4,000 million pounds in 1947. The total exports and shipments of whole milk dairy products was the smallest since 1940. The movement of non-fat dry milk solids (dry skim milk) into export channels in 1948 was the smallest since 1941, but still account for about a quarter of domestic production.

Prospects for 1949

Civilian per capita consumption of milk in all forms in 1949 is not expected to change much this year. Consumption of condensed and evaporated milk, cheese, and butter may increase slightly, while a slight further decline may occur for fluid milk and cream, and ice cream. Except for butter, consumption per person of all dairy products in 1949 will be well above the 1935-39 level.

In the first six months of 1949, domestic supplies will be larger than in the preceding year. On January 1, storage holdings of dairy products (measured in terms of whole milk equivalent) were greater than a year earlier by 1 billion pounds, about half of this increase in holdings of evaporated milk. Milk output on farms probably will be larger than a year earlier during the first half of 1949.

Through the next several months, a higher rate of milk output per cow is likely to offset the smaller number of cows on farms. With continued high price of meat animals relative to dairy products, the downward trend in cow numbers is likely to be prolonged. This is most important in midwest areas of the United States.

Exports of whole milk manufactured products (i.e., principally cheese, evaporated milk and dried whole milk) in 1949 probably will not be much different from the previous year. Exports and shipments of non-fat dry milk solids (dry skim milk) are expected to be moderately larger.

Retail prices of dairy products as a group are likely to be somewhat lower than the 1948 average, but otherwise at about record levels. Although the production of milk thus far in 1949 has been larger than a year earlier, prices of fluid milk have remained fairly steady. Prices of manufactured dairy products have declined and with them the price of milk for manufacturing has gone down. The dollar and cents spread between prices of milk for fluid uses and for manufacturing is the largest on record. On a percentage basis, the spread is the largest since early 1941.

Fats and Oils

Review of 1948

Civilian disappearance per person of 42.2 pounds, fat content, of food fats and oils was the highest since 1942. Substantially higher consumption of vegetable oils in margarine and slightly higher use in shortening more than offset the reduction of about 1 pound per capita in

butter consumption. There was also a slight increase in the consumption of lard. Factory and warehouse stocks of food fats and oils were drawn down more than seasonally during the middle of the year to meet the consumer demand for fats, and on October 1 were at the lowest for that date since 1926. By the end of the year, however, they had been built up and exceeded by 21 percent the stocks of food fats and oils at the beginning of 1948.

Output of all fats and oils for food use was greater in 1948 than in 1947. Vegetable oil use in edible products showed a considerable increase whereas the production of lard was down 4 percent and of butter 7 percent. Margarine production was stimulated by the unusually high butter prices in the first 8 months of 1948 and reached a new record total for the year of about 900 million pounds actual weight compared with 746 million pounds in 1947. Production in the last quarter of the year, however, was slightly smaller than in the last quarter of 1947. The decline in butter production reflects a continued relatively high livel of fluid milk consumption and use of milk in manufactured whole milk products.

Exports of food fats and oils, including oil equivalent of soybeans and peanuts, were slightly lower than in 1947. For food fats and oils as such, exports from this country were smaller in 1948 than in the year before, totaling about 450 million pounds (including shipments to U. S. Territories) as compared with 614 million pounds in 1947. However, exports of soybeans and peanuts for crushing abroad were more than twice as large as in 1947, when the oil equivalent was nearly 100 million pounds.

Supplies of butter were small throughout the year with the retail price in the first six months averaging 20 percent higher than in January-June 1947. Prices of butter declined contra-seasonally after midsummer, apparently influenced by increased supplies of other fats and oils, and lower storage demand than usual. In October, November and December the retail price of butter averaged 77.4 cents, 74.9 cents and 75.6 cents per pound, respectively, in large cities according to the Bureau of Labor Statistics, compared with a range of 85 to 94 cents per pound in the first nine months of the year. The spread between butter and margarine prices at retail was much greater in 1948 than in 1947. The difference averaged 48 cents per pound in the first nine months of 1948 compared with 37 cents a year earlier. However, during the last three months of 1948, this difference declined to 37 cents per pound.

Bumper crops of oilseeds in the fall of 1948 led to a substantial decline in prices of cottonseed, peanut, corn and soybean oils during the late summer and fall, which were partly reflected in lower retail prices for shrotening, margarine, cooking and salad oils.

Lard output was lower in the early part of 1948 than in the comparable months of 1947 but substantial supplies of vegetable oil shortening apparently contributed to the stability in lard prices for most of the year. In the fall of 1948 and early winter of 1949, lard output was significantly greater than a year earlier. An unusually large percentage of the spring pig crop was slaughtered before midwinter this season.

Prospects for 1949

Large supplies of vegetable oil products are assured for the first half of 1949 by the record soybean production and very large cottonseed output. Production of the four major edible vegetable oils (soybean, cottonseed, corn, and peanut) in October 1948 to September 1949 may total as much as 10 to 15 percent more than the record of 8.2 billion pounds produced in 1947-48.

Lard output in the current quarter is expected to approximate that of January-March 1948. A fairly sharp seasonal decline in the number of hogs slaughtered in the next month or two will be largely offset by seasonal increases in the yield of lard per hog. Considerable increase in lard production is in prospect for April-September of this year compared with a year earlier as a result of the 8 percent increase in the 1948 fall pig crop. Further increases in production are indicated for next winter. The number of sows to farrow this spring is substantially higher than last year according to preliminary reports from farmers.

Exports of fats and oils this winter are notably higher than a year ago. With larger supplies of fats and oils, it appears likely that exports will run higher throughout most of the year than in 1948.

Prices of most fats and oils are substantially lower now than in the late winter of 1948. These prices probably will continue lower than a year earlier in view of the record supplies of vegetable oils and prospective increases in lard production.

Fruit

Review of 1948

Civilian per capita consumption of fresh and processed fruit (fresh equivalent basis) was 215 pounds, a decline from the 225 pounds of 1947. Most of the reduction occurred in fresh fruit, which accounted for 62 percent of the total fruit consumption. Tree nuts consumption was 1.4 pounds per capita, about the same as a year earlier.

Fresh fruit consumption amounted to 134 pounds per capita in 1948, nearly 12 pounds under the preceding year's rate and 4 pounds below the 1935-39 average. The reduction from the 1947 level was both in citrus and deciduous fruits. On an individual commodity basis, the largest declines were indicated for oranges and peaches. Imports of bananas in 1948, equivalent to about 20 pounds per capita, were about the same as the year earlier. However, exports of fresh fruits were substantially less than in 1947 largely due to the continuing limitations and restrictions imposed by importing countries.

The fruit crop in 1948 amounted to 16.7 million tons, 6 percent below the output of a year earlier, with an 11 percent smaller output of deciduous fruit. Citrus fruit production for all uses, about 7.8 million tons, was not much different from that of 1947. Among the major deciduous fruits, the 1948 crops of apples, pears, peaches, prunes and figs were considerably smaller than the respective 1947 output. On the other hand, the crops of apricots, sour cherries, cranberries, strawberries and olives were considerably higher than in 1947. Tree nuts production set a new record in size, principally because of the record large pecan crop.

The consumption of all processed fruits was slightly higher per capita than in 1947 with the increases coming in fruit juices. For canned fruit, the civilian per capita consumption rate in 1948 was around 18 pounds (processed weight), about the same as a year earlier. Exports of canned fruits were considerably below the 1947 rate, but military procurement was a little larger.

Total supplies of canned fruits during 1948 were slightly higher than in 1947. The 1948-49 commercial pack was about 4 percent below the previous year's pack, but almost 50 percent larger than the 1935-39 average. The 1948-49 packs of apricots, sweet cherries, sour cherries, and fruit cocktail and salad, were larger than those of a year earlier. Those increases were more than offset by declines in the production of canned apples, applesauce, peaches, and pears. Indications are that receipts of canned pineapple from Hawaii were a little larger than a year earlier, and imports of canned pineapple and olives in brine were considerably larger.

Total supplies of canned fruit juices were plentiful at relatively low prices in 1948. Civilian consumption was about 17.8 pounds per capita, more than a pound larger than in 1947. The 1947-48 commercial pack of canned fruit juices was a record at 2,500 million pounds; about five-sixths of which was citrus juice. The 1948-49 commercial pack of fruit juices appears to be running somewhat lower than a year earlier. Supplies of pineapple juice from the 1948 pack in Hawaii may be slightly larger than those from the preceding year's output.

Civilian per capita consumption of frozen fruits, fruit juices and berries was about 3 pounds, down 10 percent from the 1947 rate, despite a moderate increase in production. This was the first time in 5 years that consumption did not increase over the previous year. There were substantial increases over 1947 in the production of frozen strawberries, sour cherries and concentrated orange juice. However, these were more than offset by smaller packs of peaches, apricots and apples. Cold-storage stocks on January 1, 1949 were about 10 percent lower than a year earlier.

The 1947-48 pack of dried fruits of 577 thousand tons (processed weight), an increase of 14 percent above the 1946-47 output, provided more supplies than consumers were willing to take even at reduced prices. Civilian consumption during 1947-48 was 4.2 pounds per capita, not much different from the preceding year but below both the 1944-45 high level of 6.1 pounds and the 1935-39 average of 5.8 pounds. To help provide outlets for the excess dried fruits during the year, the Department of Agriculture purchased about 274 thousand tons mostly from the 1947-48 pack and instituted programs to distribute this fruit through export channels and domestically, through the school lunch program and institutions.

Prospects for 1949

Supplies of some fresh and frozen fruits will be lower in the first half of 1949 than a year earlier. However, for canned fruits and fruit juices the supplies will be somewhat larger. During the latter half of the year, supplies of fresh and processed fruits will be seasonally larger.

Cold-storage stocks of fresh apples on January 1, 1949, were about 40 percent smaller than a year prior, and pears were 27 percent lower. The reduced carry-over stocks resulted mainly from the small 1948 crops of these fruits. The production of oranges, grapefruit and lemons was reduced by freezing weather in California, Arizona and Texas during January. As a result, smaller supplies of citrus fruits will be available from these States during the winter and spring months of 1949.

Supplies of the major processed fruit items are sufficiently large to permit a high rate of consumption at least until the 1949 pack begins coming to market. Producer and wholesale distributor stocks of a number of important canned fruits were reported to be moderately larger on January 1 than a year earlier. Total cold-storage stocks of frozen fruits at the beginning of the year were 10 percent below the level of January 1, 1948, but stocks of frozen raspberries, strawberries, fruit juices and purees were larger.

The 1948-49 pack of dried fruit, most of which will be consumed during 1949, was 23 percent lower than in the preceding year. However, supplies appear to be in excess of domestic and export demand at prevailing prices and the Department of Agriculture has already found it necessary to purchase substantial quantities of dried fruit. Between October 1948 and late January 1949, the Department purchased about 86 thousand tons of prunes and raisins from the 1948-49 pack. In the prewar years, exports accounted for over a third of the crop; in 1946-47, exports were equal to almost 30 percent of the pack.

With average weather and good care of orchards, the 1949 deciduous fruit crop should be somewhat larger than the crop in the preceding year. Increases in production from below average 1948 crops are expected for apples, pears and peaches. Banana imports probably will be at least as large as in 1948.

Vegetables

Review of 1948

Consumption of vegetables by United States civilians in 1948 changed somewhat from the previous year. Fresh vegetable consumption for the year as a whole averaged slightly higher per person with substantially larger consumption in the latter half of the year more than offsetting reductions in the early part of the year. The short supply situation in early 1948 resulted from lower carry-over of storage vegetables, such as cabbage and onions, and from smaller truck crop output in the spring. Consumption of canned vegetables, potatoes, sweetpotatoes and dried peas declined for the second year and frozen vegetable consumption fell off slightly. With the exception of potatoes and frozen vegetables the declines were due to lower production. Dry bean consumption appears to have been somewhat higher in 1948 than in 1947.

Fresh vegetable consumption by civilians in 1948 is estimated at 256 pounds per capita. Although this was slightly above the rate of the year preceding, it was still significantly below the record of 270 pounds set in 1946. The slight increase compared with 1947 rate of consumption was due primarily to the increase in production of cabbage and onions which more than offset relatively low carry-over stocks at the beginning of the year. By the fall season, supplies of fresh vegetables increased considerably, and the

retail prices of many vegetables went below those prevailing in the latter part of 1947, whereas in the early part of the year they had been running above the previous year's prices.

Canned vegetable consumption per person in 1948 was only a little smaller than in the preceding year but significantly smaller than the 1946 record of 46.2 pounds. The 1948 commercial pack of canned vegetables appears to have been the smallest since 1940. Despite some increase in the pack of frozen vegetables in 1948 over the 1947 pack the rate of consumption per person appears to have been slightly smaller. In 1947, supplies from the new pack were considerably augmented by the use of cold-storage holdings from the previous year's pack.

Both potato and sweetpotato consumption were lower on a per person basis than in 1947. The decline in sweetpotato consumption reflected the smaller crop, but the decline in the consumption of potatoes occurred despite the substantially larger crop. Under price support legislation, it was necessary for the Department of Agriculture to purchase in 1948 about 90 million bushels for diversion from regular marketing channels in order that the farm price of potatoes might be maintained at about 90 percent of parity. Further large purchases of 1948 crop potatoes are expected in 1949. Relatively minor quantities of the potatoes procured by the Department were distributed to school lunch programs and charitable institutions, most of them were sold for processing into alcohol, livestock feed, potato flour and starch. Retail prices of potatoes in 1948 were higher than a year earlier in 9 of the first 11 months of the year.

With the production of dry edible beans considerably larger than in 1947, supplies for domestic consumption were substantial and exports were substantially larger, mostly for relief feeding in the occupied areas. Retail prices of dried beans through the first 9 months of 1948 were slightly higher than a year earlier.

Prospects for 1949

Moderately smaller quantities of winter vegetables are expected to be available for marketing in the first quarter of 1949 than in the same period of 1948. This is largely due to recent freezing weather in winter vegetable producing areas. Although the stocks of canned and frozen vegetables are not as large as a year ago, they are sufficient to maintain a relatively high rate of domestic consumption. During the late winter and spring, however, potato supplies will continue plentiful. Storage stocks on January 1, 1949 were the second largest on record. Smaller quantities of sweetpotatoes will be available this spring because of last year's small crop and the low carry-over.

Retail prices of most fresh and processed vegetables are expected to continue at about present levels in early 1949. On the other hand, prices of dry onions and cabbage may be substantially lower than in early 1948, and those of potatoes, slightly lower.

Grain products

Review of 1948

Even though supplies were large, the total domestic food use of wheat in 1948 was about 475 million bushels, the lowest since 1940. On a per capita basis civilian consumption of wheat products in the United States was only 195 pounds (grain equivalent), as compared with 204 pounds in 1947 and 220 pounds in the prewar period 1935-39.

Stocks of wheat in all storage positions on January 1, 1949 were 857 million bushels, the largest since 1943. This quantity was held as stocks despite the fact that exports and shipments of wheat and wheat flour (including 184 million bushels for civilian feeding in occupied areas abroad) reached the equivalent of about 503 million bushels -- the largest exports of any single nation in history in one calendar year. Deducting the January 1 stocks, domestic food use and 1948 exports from the total 1948 supplies of 2090 million bushels (January 1, 1948 stocks of 802 million bushels and a crop of 1288 million bushels) indicates that total domestic disappearance other than for civilian food use amounted to 255 million bushels. The total quantity of wheat used for animal feed was 157 million, larger than the amount thus used in 1935-39 but sharply below recent years; 92 million bushels were used for seed; and the equivalent of 6 million were taken by the military for men in the armed forces.

The retail prices of white bread, as reported by The Bureau of Labor Statistics increased 0.7 percent to a record 13.9 cents between January and February, and then remained constant during all of 1948. For the year as a whole, prices averaged more than 11 percent above the 1947 level. The price of wheat flour in 1948 averaged 2 percent higher than a year earlier. Prices declined in almost every month in 1948 in contrast with a rise in almost each month in 1947.

A recent study 1/ indicates that "over a period of years, the price farmers get for their wheat has tended to move in the same direction as the retail prices of flour and bread. However, between January and October 1948, the U. S. average local market price of wheat dropped 30 percent; the retail price of flour dropped 15 percent; but the retail price of bread rose 0.7 percent The marketing margin for flour decreased 2 percent, while the marketing margin for bread increased 9 percent."

"A number of variable costs are included in the marketing margins for flour and bread. On the other hand, a substantial part of these margins is made up of fairly stable costs such as wages and salaries, transportation costs, storage, and packaging. On the whole, these costs increase and decrease along with the general level of prices, but to a lesser extent; and they tend to lag behind the general price changes. This makes the marketing charges relatively rigid in comparison with retail prices."

The production of rye in 1948 was 26.4 million bushels, the largest since 1943 although below the average 1935-39 output of almost 45 million bushels. Domestic civilian consumption of rye products as food was 5.4 million bushels, grain equivalent. On a per capita basis, consumption was about 2.1 pounds, somewhat below the 1947 level of 2.2 pounds and below the 2.9 pounds in 1935-39. Only about 1.5 million bushels were exported. About 18 million bushels, were used for spirits, alcohol, seed and animal feed. Working stocks on January 1, 1949 totaled 17.2 million.

Rice consumption by civilians in the United States in 1948 was about 4.8 pounds (milled basis) per capita, about the same as a year earlier but below the 5.6 pounds in 1935-39. Retail prices of rice averaged 31 percent above 1947. At these prices, supplies from the record 1947 crop were sufficient to meet the reduced domestic demand and provide substantial quantities for export. Exports and shipments to United States territories in the 1948 marketing year were the largest quantity every shipped out of the country.

1/ "Farm-to-Retail Margins for White Flour and White Bread" by W. Edward Blackmore, U. S. Department of Agriculture, December 1948.

Corn products were in relatively shorter supply during the first three quarters of the year (after the short 1947 crop) than they were during the comparable period of 1947. With the very heavy marketings in the fall season from the record 1948 crop of 3,651 million bushels, the production of corn sirup, sugar and starch increased substantially. Civilian consumption of corn products in 1948 was approximately 58 pounds (grain equivalent) per capita, a reduction of about 15 percent from the preceding year's level. Exports of corn and corn products in 1948 were only one third as large as the very large quantity which was shipped out of the country in 1947.

Reports of the Bureau of Labor Statistics indicate that the retail price of corn flakes averaged 23 percent higher and that of corn meal about 10 percent above 1947. The price of corn flakes rose slightly in 1948, but for corn meal the movement was generally in the opposite direction. During the last 6 months of the year, the retail price of corn meal declined about 10 percent.

Civilian consumption of barley and oat food products in 1948 was respectively 2.6 pounds and 9.8 pounds (grain equivalent) per capita. In both cases consumption was not much different from the 1947 rate. Supplies were large throughout 1948.

Retail prices of barley and oat food products remained fairly stable throughout 1948. Reports indicate that the price of rolled oats was about 17 percent higher than the average of 14.6 cents per pound for 1947.

Prospects for 1949

With large harvests in 1948, grains are again generally in plentiful supply. Retail prices of grain products are expected to continue near present levels at least in the first half of 1949.

Supplies of wheat in 1949 are expected to be large. The acreage seeded to winter wheat in 1948 was a new record high at 61.4 million acres, and indications are that the crop may be 965 million bushels, below the record of 1,068 million in 1947 but above the 1937-46 average of 689 million bushels. If conditions are favorable, a large acreage of spring wheat will be seeded. Disappearance of wheat in the first 6 months of 1949 is expected to be about as follows: food, 235 million bushels; feed, 65 million; seed, 26 million; and exports, 230 million. If the distribution occurs as currently anticipated, the July 1, 1949 carry-over would be about 300 million bushels, higher than the prewar 1932-41 average of 225 million bushels. With wheat supplies established and no significant change in demand in prospect, flour and bread prices are expected to continue at about current levels at least during the first half of 1949.

Use of rye in 1949 is not expected to be much different from that of the preceding year. Although the acreage seeded in rye was 3.4 million acres, 11 percent below a year earlier, the prospective smaller output than the 26 million bushels of 1948 is likely to cover anticipated requirements.

Supplies of rice in 1949 are expected to continue large. A new record crop was harvested in 1948, and supplies are expected to be large enough to meet anticipated domestic demand and to provide substantial quantities for export.

The large crops of corn, barley and oats in 1948 will provide sufficient supplies to meet the expected domestic and foreign demand for these products during the first half of 1949. Wholesale prices in the first 6 months of the year will average lower than during the comparable period of 1948, and probably will in part be reflected at the retail level.

Sugar

Review of 1948

Calendar 1948 was the first full year since 1942 in which sugar was neither under price control nor distributed in the United States under the point rationing system. The total amount of sugar consumed by civilians was about 7.0 million tons, refined basis, the largest on record. On this basis, the preliminary estimate of civilian per capita consumption in 1948 would be 96 pounds, the highest since 1942.

Production of sugar in the continental United States in the 1947-48 crop year totaled about 2,208,000 tons, raw basis. Of this quantity, 376,000 tons were cane sugar and the remainder, beet sugar.

During the year the Department of Agriculture, under the authority of the Sugar Act of 1948, set quotas on the quantity of domestic sugar that could be marketed. Sugar prices averaged lower than in 1947. The average wholesale price of refined sugar in 1948 was 6 percent below the preceding year's level, 7.62 cents per pound as compared with 8.12 cents. The average retail price was 3 percent lower than in 1947, 9.4 cents per pound as compared with 9.7 cents.

Prospects for 1949

Total domestic requirements (military and civilian) for 1949 have been estimated at 7,250,000 tons, raw basis (6,776,000 tons refined basis). This total represents the amount of sugar from the continental United States beet and cane sugar producing areas that may be marketed, and the quantity that may be brought into the country from offshore producing areas under the quota system as established under the Sugar Act of 1948.

There will be ample supplies of sugar produced for United States needs in 1949. The total output of the United States mainland and offshore producing areas, Cuba and the Philippine Republic is expected to be 10,884,000 tons, raw basis, in the 1948-49 crop year. Production of beet and cane sugar in continental United States is likely to be 1,850,000 tons, about 16 percent less than the quantity produced from the 1947-48 crop. The world sugar crop is indicated at 37,689,000 tons, the largest on record, and 11 percent above the 1947-48 crop.

Deliveries of sugar by primary distributors in the first few months of 1949 are expected to be substantially heavier than a year earlier. Stocks at the beginning of the year were lower than in January 1948.

The price outlook for sugar currently indicates a somewhat higher average than in 1948. A decline in the world price of sugar -- i.e., the price at Cuban ports -- is expected largely because of the record world supply.

Table 5.-Production of major food commodities, calendar years, 1935-39 average, 1946, 1947, 1948, and forecasts for 1949 with percentage comparisons 1/

Commodity	Unit	Average 1935-39	1946	1947	1948 Prel.	Forecasts for 1949:	1949 as a percentage of: 1935-39	1949 as a percentage of: 1948
Meats (dr. wt.)								
Beef	Mil.lb	6,937	9,373	10,429	9,174	9,000	130	98
Veal	" "	1,638	1,440	1,599	1,422	1,300	125	91
Lamb and mutton	" "	870	970	802	751	650	75	87
Pork (excluding lard)	" "	7,337	11,173	10,605	10,194	10,800	147	106
Total meats	" "	16,182	22,956	23,435	21,541	21,750	134	101
Fish (edible weight)								
Fresh and frozen	" "	615	759	754	2/	2/	-	-
Canned 3/	" "	337	464	483	2/	2/	-	-
Cured	" "	74	63	63	2/	2/	-	-
Total fish	" "	1,026	1,286	1,300	2/	2/	-	-
Poultry and eggs								
Eggs	Mil.doz	3,335	5,098	5,069	5,083	5,150	154	101
Chicken (dr. wt.)	Mil.lb	2,327	3,597	3,458	3,230	3,500	150	108
Turkey (dr. wt.)	" "	350	687	608	495	610	174	123
Dairy products								
Total milk 4/	" "	103,656	119,284	118,892	115,945	116,700	113	101
Cheese 5/	" "	669	1,111	1,178	1,097	1,200	179	109
Cond. and evap. milk	" "	2,225	3,346	3,630	3,831	3,425	154	89
Fluid milk and cream 6/	" "	44,146	59,318	57,295	57,072	55,150	125	97
Fats and oils								
Butter, farm & factory (actual weight)	" "	2,170	1,505	1,646	1,530	1,650	76	108
Lard 7/	" "	1,624	2,114	2,316	2,205	2,300	142	104
Margarine (fat content)	" "	303	465	606	740)			
Shortening	" "	1,529	1,451	1,374	1,426)	3,720	155	110
Other edible fats and oils 8/	" "	575	683	1,075	1,226)			
Total fats and oils 9/	" "	6,201	6,218	7,017	7,127	7,670	124	108
Fruits								
Fresh:								
Citrus	" "	6,875	9,296	9,991	8,672	8,500	124	98
Apples (commercial)	" "	4,385	3,936	3,937	3,185)	9,300	102	114
Other (excl. melons)	" "	4,703	5,573	5,511	4,989)			
Processed:	" "							
Canned fruit	" "	1,705	3,094	2,648	2,545	2/	-	-
Canned fruit juices	" "	334	2,442	2,205	2,538	2/	-	-
Frozen	" "	106	523	352	393	2/	-	-
Dried	" "	1,118	1,014	1,153	891	2/	-	-

- Continued

Table 5.-Production of major food commodities, calendar years, 1935-39 average, 1946, 1947, 1948 and forecasts for 1949 with percentage comparisons 1/ - Continued

Commodity	Unit	Average 1935-39	1946	1947	1948 Prel.	Forecasts for 1949	1949 as a percentage of 1935-39	1949 as a percentage of 1948
Vegetables								
Fresh 10/	Mil.lb	30,520	38,946	35,839	37,874	38,000	125	100
Canned 11/	" "	4,030	7,638	6,116	5,544	2/	-	-
Frozen	" "	12/ 78	450	345	368	2/	-	-
Potatoes	Mil.bu	356	484	389	446	2/	-	-
Sweetpotatoes	" "	68	66	56	50	2/	-	-
Dry edible beans 13/	Mil.lb	1,360	1,474	1,604	1,955	2/	-	-
Canned baby foods	" "	48	462	353	489	2/	-	-
Sugar, raw basis	1,000 sh.tons	1,948	1,900	2,158	2,100	1,800	92	86
Grains								
Wheat	Mil.bu	759	1,153	1,367	1,288	1,275	168	99
Rye	Mil.bu	44.9	18.9	26.0	26.4	2/	-	-
Rice, milled	Mil.lb	1,340	2,044	2,207	2,274	2/	-	-
Corn, grain only	Mil.bu	2,050	2,951	2,137	3,365	2/	-	-
Oats	" "	1,045	1,498	1,199	1,492	2/	-	-
Barley	" "	239	262	281	317	2/	-	-
Peanuts	Mil.lb	1,229	2,038	2,183	2,268	2/	-	-

1/ Calendar year basis except for fresh citrus fruit for which the season begins in the fall of the previous year; dried fruits which are on a pack-year basis; rice on a marketing year. 2/ Not available. 3/ Excludes canned food products containing small quantities of fish such as clam chowder, etc. 4/ The production of total milk for human consumption given here differs from total farm production of milk in that the former excludes milk fed to calves but includes off-farm production while the latter excludes off-farm production but includes milk fed to calves. Milk fed calves and milk produced off farms are usually of approximately equal volume. 5/ Excluding full skim, cottage, pot, and bakers' cheese. 6/ Fluid milk equivalent for fresh use. 7/ Excluding amount used in manufactured products. 8/ Represents fats used in cooking and salad oils, salad dressing mayonnaise, bakery products and other minor uses such as fish canning. 9/ Fat content basis except for butter which is on an actual weight basis. 10/ Estimates of all vegetables and melons other than potatoes and sweetpotatoes include reported commercial production for fresh market shipments plus rough estimates of quantities produced in market gardens for fresh sale and farm gardens for home use. Excludes town garden production. 11/ Includes asparagus, beans (lima), beans (snap), beets, carrots, corn, hominy, kraut (including bulk), peas, pickles (including bulk), pimientos, Irish potatoes, sweetpotatoes, pumpkin and squash, tomatoes, tomato pulp, and tomato juice, tomato sauce, paste, and catsup and chili sauce, mixed vegetables. 12/ Average 1937-39. Data prior to 1937 are not available. 13/ Cleaned basis.

Table 6. - Retail food prices and total consumer price index, United States 1940-46 and 1947-48 by months

(Index numbers 1935-39 = 100)

Year and month	Meats 1/	Eggs	Dairy products 2/	Fats and oils 3/	Cereals and bakery products	Fruit and vegetables: Fresh	Fruit and vegetables: Canned	Fruit and vegetables: Dried	Sugar and sweets	Beverages	All foods	Consumer price index
1940	96	94	101	82	97	97	92	101	97	92	97	100
1941	108	112	112	94	98	104	98	107	106	102	106	105
1942	126	136	125	120	105	133	122	136	126	122	124	116
1943	134	162	135	126	108	178	131	159	127	125	138	124
1944	130	153	134	123	108	177	130	166	126	124	136	126
1945	131	164	134	124	109	188	130	168	126	125	139	128
1946	161	169	165	152	125	191	141	190	144	140	160	139
1947	217	201	186	198	155	202	166	264	180	187	194	159
Jan.	199	182	190	202	143	184	174	269	176	178	184	153
Feb.	197	170	183	201	144	189	173	270	178	183	182	153
March	208	175	188	219	148	199	173	271	179	187	190	156
April	203	176	179	228	153	201	173	270	179	190	188	156
May	204	179	172	200	154	210	172	268	179	189	188	156
June	217	183	172	188	155	208	170	263	180	181	190	157
July	220	203	179	182	155	204	168	264	180	181	193	158
Aug.	228	212	184	178	156	202	166	263	180	182	196	160
Sept.	241	236	195	177	158	202	157	261	181	187	204	164
Oct.	236	233	190	190	160	201	155	256	182	191	202	164
Nov.	227	225	198	196	168	205	156	252	183	195	203	165
Dec.	227	236	205	208	170	212	158	255	184	198	207	167
1948	246	209	205	196	171	212	158	247	174	205	210	171
Jan.	238	214	206	209	173	216	158	257	183	202	210	169
Feb.	225	189	204	194	172	222	158	256	177	204	205	168
March	225	186	201	192	171	214	158	254	174	204	202	167
April	234	185	206	191	171	228	156	252	174	204	208	169
May	244	185	205	197	171	229	156	250	173	205	211	170
June	255	194	206	200	171	225	157	248	171	205	214	172
July	262	204	209	201	171	223	158	248	171	205	217	174
Aug.	267	220	211	198	171	205	158	249	172	205	217	174
Sept.	265	227	209	197	171	200	159	249	173	206	215	174
Oct.	256	239	203	193	170	197	159	238	173	206	212	174
Nov.	247	244	200	189	170	192	159	231	173	206	208	172
Dec.	241	217	199	184	170	196	159	230	173	208	205	171

Index numbers from Bureau of Labor Statistics and rounded to the nearest whole number by Bureau of Agricultural Economics.

1/ Includes chicken and fish.
2/ Includes butter.
3/ Excludes butter.

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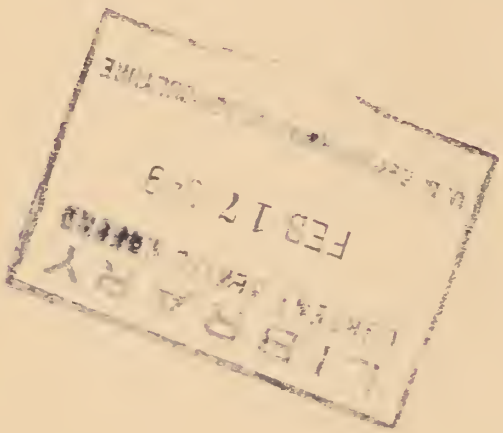

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THE National Food SITUATION

BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

NFS-48 BAE APRIL - JUNE 1949

SUMMARY

Food supplies have been somewhat larger during recent months than they were in the same months of 1948. More pork, butter, cheese, vegetable oils and corn products have been available, but supplies of other foods differed little. Supplies of many foods will increase seasonally in the late spring and summer, and retail food prices in the summer months are expected to average lower than in the same period last year.

United States civilian per capita consumption of food this year is expected to be not much different from 1948 but 10 percent above the 1935-39 level. Consumption of most livestock products in 1949 will be about the same as last year. More pork and better grades of beef will be consumed, but less veal, lamb and mutton, and lower grades of beef. Some increases are expected for turkey, butter, cheese and evaporated milk, but the consumption rates of fluid milk and cream, ice cream, eggs and lard are likely to decline slightly.

The report on 1949 crop intentions indicates an increase in planted acreage over last year only for wheat and dry field peas. No change from the 1948 acreage is indicated for oats and rice. On the other hand, farmers intend to devote less of their land to the production of barley, corn, potatoes, sweetpotatoes, dry edible beans, peanuts and sugar beets. However, any heavy abandonment of fall-sown crops may change plans for spring planting.

The civilian per capita consumption of canned fruits and vegetables, and some of the corn products probably will be higher in 1949 than last year. Some decreases in the rate of consumption are anticipated for fresh apples and citrus fruits, canned fruit juices, and sugar. For other foods, not much change from 1948 is expected.

The civilian per capita consumption of food in the United States in 1949 will exceed the 1935-39 average for all major foods except lamb and mutton, butter, shortening, fresh fruit, dried fruit, potatoes and sweetpotatoes, dry edible beans, and wheat and some corn products.

No sharp decline in retail food prices from last year's level is expected for 1949. General economic activity has weakened somewhat from the 1948 record but will remain high throughout the year.

Table 1.-Volume of agricultural production for sale and for farm home consumption and civilian per capita food consumption, 1943-48 and indications for 1949, with percentage comparisons
(Revised)
(Index numbers, 1935-39 = 100)

Item	1943	1944	1945	1946	1947	1948	1949 forecast 1/	1949 as a percentage of 1948
Food grains 2/	116	148	155	164	197	184	188	102
Truck crops 3/	124	137	142	158	141	142	140	99
Fruits and nuts 4/	108	123	112	133	126	123	124	101
Vegetables, excluding truck crops 5/	125	106	110	128	108	122	102	84
Sugar crops 6/	81	81	94	103	110	89	88	99
Total food crops 7/	116	129	130	145	147	144	141	98
Meat animals 8/	149	155	147	145	145	134	137	102
Poultry 9/	162	166	170	160	157	153	164	107
Dairy products 10/	113	115	119	119	117	114	117	103
Total food livestock	140	144	142	139	138	131	136	104
Food production	134	140	139	140	140	134	137	102
Agricultural production, food and non-food	129	137	134	137	136	137	138	101
Civilian per capita food consumption	109	112	114	119	115	111	110	99

1/ Production estimates are based on prospective acreage, preliminary crop indications, and estimated marketings and home consumption of livestock and livestock products for the calendar year 1949.
2/ Includes wheat, rye, rice, and buckwheat.
3/ Includes truck crops for market (artichokes, asparagus, lima beans, snap beans, beets, cabbage, cantaloups, carrots, cauliflower, celery, cucumbers, eggplant, lettuce, onions, peas, peppers, spinach, tomatoes, and watermelons) and truck crops for processing (asparagus, lima beans, snap beans, beets, cabbage, sweet corn, cucumbers, peas, spinach, and tomatoes).
4/ Includes apples, peaches, pears, cherries, apricots, grapes, strawberries, cranberries, oranges, grapefruit, lemons, olives, dried California figs, fresh and dried plums, almonds, pecans, and walnuts.
5/ Includes dry edible beans, potatoes, and sweetpotatoes.
6/ Includes sugar beets, sugarcane for sugar, sugarcane sirup, sorgo sirup, maple sugar, and maple sirup.
7/ Includes peanuts in addition to the other crops.
8/ Includes cattle and calves, sheep and lambs, and hogs.
9/ Includes eggs, chickens, turkeys, and broilers.
10/ Includes wholesale milk, retail milk, butterfat, farm butter, and farm consumption of dairy products.

Table 2.- Total food utilization: Source and distribution, 1935-39 average and 1940 to 1949 1/
(Revised)

Year	Total food utilization	Source of total food: Food production	Imports	Reduction in stocks	Increase in stocks	Distribution: Civilian	Military, including military civilian feeding	Department of Agriculture 2/: Net purchases	Deliveries	Reduction in stocks	Increase in stocks	Commercial exports and shipments 3/
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent
Section a. Percentage of food utilization in each year												
1935-39 Av.	100.0	93.9	6.1			97.7		- .2		.2		2.5
1940	100.0	95.1	5.5		.6	98.0						2.0
1941	100.0	94.4	5.8		.2	93.8	2.0	2.4	1.9		.5	1.8
1942	100.0	94.2	3.7	2.1		87.2	5.8	5.9	4.5		1.4	1.1
1943	100.0	95.8	4.8		.6	81.4	9.6	8.1	7.1		1.0	.9
1944	100.0	94.0	5.0	1.0		79.7	13.2	6.0	6.5	.5		1.1
1945	100.0	95.7	4.8		.5	82.3	4/ 12.0	4.2	5.2	1.0		1.5
1946	100.0	96.1	4.3		.4	89.7	4/ 3.2	4.4	5.2	.8		2.7
1947	100.0	95.4	4.8		.2	89.7	4/ 3.3	2.9	2.8		.1	4.1
1948	100.0	94.8	5.0	.2		91.5	4/ 3.4	2.0	2.2	.2		3.1
1949 forecast	100.0	94.8	5.0	.2		91.5	4/ 3.4	2.0	2.2	.2		3.1
Section b. Percentages of 1935-39 food utilization												
1935-39 Av.	100.0	93.9	6.1			97.7		- .2		.2		2.5
1940	109.6	104.2	6.0		.6	107.4						2.2
1941	114.4	108.0	6.7		.3	107.3	2.3	2.7	2.2		.5	2.1
1942	125.6	118.3	4.7	2.6		109.5	7.3	7.4	5.6		1.8	1.4
1943	131.3	125.8	6.3		.8	106.9	12.7	10.6	9.3		1.3	1.1
1944	139.9	131.5	7.0	1.4		111.4	18.4	8.5	9.1	.6		1.6
1945	136.4	130.5	6.6		.7	112.2	4/ 16.4	5.7	7.1	1.4		2.1
1946	136.7	131.5	5.8		.6	122.6	4/ 4.3	6.1	7.1	1.0		3.7
1947	137.7	131.4	6.6		.3	123.7	4/ 4.5	3.9	3.8		.1	5.6
1948	132.8	125.8	6.7	.3		121.6	4/ 4.5	2.6	2.9	.3		4.1
1949 forecast	134.6	128.6	6.1		.1	122.3	4/ 5.3	2.8	2.8			4.2

1/ The upper section of the table divides the total utilization in each year (1) according to the source of the food and (2) according to its distribution. Both the total utilization figure and the break-down are on an index-number basis; that is, they represent quantities weighted by average farm prices in the period 1935-39. The utilization figure includes both domestically produced and imported foods. The lower section contains the same data expressed as a percentage of total food utilization in 1935-39 instead of total utilization in each year. 2/ The quantities assigned to the Department of Agriculture are food for lend-lease, relief, and purchases for foreign governments, except for meat transactions in the drought years. These quantities are measured (1) in terms of Department of Agriculture purchases from commercial channels and (2) in terms of shipments out of the country. When measured in terms of purchases, additions to Department of Agriculture stocks are included. When measured in terms of shipments, additions to stocks are shown separately. When Department of Agriculture shipments were smaller than the total quantities purchased, stocks were built up; and vice versa. 3/ For the war years, these data indicate the commercial portion of exports and shipments, which is total exports and shipments minus the exports assignable to the Department of Agriculture.
4/ Including procurement for relief feeding in areas occupied by our armed forces.

RETAIL FOOD PRICES

No sharp change from the 1948 level is expected in the general economic factors which affect consumer demand. The consumer demand for food may not be quite as strong in 1949 as a year ago, and food supplies are not now anticipated to be much different. As a result, for 1949 as a whole, retail food prices are likely to average somewhat below last year. In the next few months, food prices are likely to be generally lower than in the same months of 1948.

The index of retail food prices as computed by the Bureau of Labor Statistics averaged 203 (1935-39 = 100) for the first quarter of 1949. This was only slightly less than a year earlier but 3 percent below the average for 1948. The retail price index reached a peak of 217 in August 1948, then declined in every subsequent month until December. A small price increase was reported for January 1949. This was followed by a 4-percent decrease in February and another slight increase in March.

Compared with the first quarter of 1948, the index of retail food prices in January-March 1949 averaged lower. Increases for fresh and processed fruits and vegetables, and beverages were more than offset by declines in the price index for all other commodities except meat. No change in the index was reported for meats.

Economic trends during the latter part of 1948 and early 1949 indicate that the tremendous demand for most types of consumer goods appears to be slackening now that the backlog demands carried forward from the war years have largely disappeared. Savings by individuals have been increasing. Nevertheless, consumer incomes in 1949 are likely to continue sufficiently high to support greater expenditures than in any year prior to 1948. General economic activity is expected to continue at a high level throughout 1949 but somewhat lower than last year. A sharp drop is not indicated for the year in view of the fact that investment by business for new plant and equipment and private spending for housing are expected to continue heavy although somewhat below last year's level. Expenditures by Federal, State and local governments are likely to be greater than in 1948.

The foreign demand for agricultural foods produced in the United States is likely to continue strong. Although much progress has been made in many food deficit countries abroad in improving their own output, they still need substantial food imports to maintain the diets of their people above minimum nutritional levels. In European countries, the principal importers of food products from the United States, early crop conditions are slightly less favorable than a year ago, and any decline in production will be reflected in increased need for imports. Financial outlays by the United States are expected to continue to provide important foreign outlets for farm products.

Some change from 1948 in the composition of food exports is expected this year. The 1949 exports of corn, rye, meats, fats and oils, and dairy products (including nonfat dry milk solids) probably will be larger, while those of wheat may be lower.

Table 3.-Apparent civilian consumption of major food commodities on a per capita basis, calendar years, 1935-39 average, 1945, 1946, 1947, 1948 and preliminary indications for 1949 with percentage comparisons 1/
(Primary distribution weight)

Commodity	Average 1935-39	1945	1946	1947	1948	Preliminary indications for 1949	1949 as a percentage of 1935-39	1949 as a percentage of 1948
	Pounds	Pounds	Pounds	Pounds	Pounds	Pounds		
Meats (carcass weight) - Total	126.2	144.4	153.4	155.0	146.4	146.8	116	100
Beef	55.2	59.0	61.3	69.1	63.3	61.8	112	98
Veal	8.1	11.8	9.9	10.7	9.4	8.6	106	91
Lamb and mutton	6.8	7.3	6.6	5.4	5.0	4.1	60	82
Pork (excluding lard)	56.1	66.3	75.6	69.8	68.7	72.3	129	105
Fish (edible weight) - Total	11.1	10.6	11.0	10.8	11.0	2/	-	-
Fresh and frozen	5.3	7.1	6.2	6.2	6.5	2/	-	-
Canned 3/	4.8	2.6	3.8	3.8)	4.5	2/	-	-
Cured	1.0	.9	1.0	.8)				
Poultry products								
Eggs 4/	37.3	49.6	46.8	47.4	48.2	47.9	128	99
Chicken (dressed weight)	17.9	28.8	25.4	23.6	23.0	22.9	128	100
Turkey (dressed weight)	2.6	4.3	4.5	4.5	3.7	3.8	146	103
Dairy products								
Total milk (whole milk equivalent)	801	803	813	794	750	753	94	100
Cheese	5.5	6.6	6.6	6.9	6.8	7.0	127	103
Condensed and evaporated milk	16.7	18.2	18.5	20.4	20.6	20.9	125	101
Fluid milk and cream	340	432	423	398	387	370	109	96
Fats and oils - Total, fat content 5/	44.7	38.8	39.7	41.8	42.2	43.7	98	104
Butter, farm and factory (actual weight)	16.7	10.9	10.5	11.2	10.0	10.8	65	108
Lard	11.0	11.6	11.8	12.7	12.7	12.5	114	98
Margarine (actual weight)	2.9	4.0	3.8	5.0	6.1)			
Shortening	11.7	9.1	10.1	9.3	9.6)	22.6	108	100
Other edible fats and oils	6.3	6.1	6.2	6.9	7.0)			
Fruits								
Fresh - total	137.7	144.7	140.9	145.5	133.8	131	95	98
Citrus	48.9	66.2	58.7	61.9	53.8	50	102	93
Apples (Commercial)	30.4	22.9	23.2	25.2	25.2)	81	91	101
Other (excluding melons)	58.4	55.6	59.0	58.4	54.8)			
Processed								
Canned fruit	14.9	14.3	21.8	18.2	17.7	19.5	131	110
Canned juices	3.8	10.9	17.7	16.3	18.1	16.2	426	90
Frozen	.8	2.3	3.1	3.2	2.9	3.0	375	103
Dried	5.8	5.9	4.5	4.4	4.0	2/	-	-
Vegetables								
Fresh	235	267	271	251	256	256	109	100
Canned	29.9	42.9	46.6	40.0	36.5	38.3	128	105
Frozen	6/ .4	1.9	2.0	2.6	3.0	2.9	725	97
Potatoes	131	126	128	123	108	110	84	102
Sweetpotatoes	21.4	18.8	17.8	15.8	14.0	14.0	65	100
Dry edible beans	8.8	7.7	8.7	8.5	7.7	8.5	97	110
Sugar (refined)	96.5	73.5	74.6	91.8	96.0	90-95	96	96
Grains								
Corn products:								
Corn meal	22.9	18.0	15.9	14.6	14.5	15	66	103
Corn sirup	7.6	11.9	11.8	12.8	8.2	10	132	122
Corn starch	1.3	1.9	1.8	1.9	1.7	1.7	131	100
Corn sugar	2.7	3.9	3.8	4.5	4.0	4.5	167	112
Breakfast cereals	1.6	2.2	2.0	1.7	1.7	1.7	106	100
Hominy	1.4	2.3	2.4	2.4	2.4	2.4	171	100
Oatmeal	3.9	3.6	3.7	3.5	3.4	3.5	90	103
Barley food products 7/	1.4	1.5	2.0	1.9	1.5	1.5	107	100
Wheat:								
Flour 8/	153	158	154	140	135	135	88	100
Breakfast cereals	3.7	3.7	3.5	3.5	3.5	3.5	95	100
Rye flour	2.2	2.6	1.9	1.7	1.6	1.6	73	100
Rice, milled	5.6	4.9	4.0	5.8	4.9	5.0	89	102
Beverages								
Coffee 9/	14.0	16.3	19.9	17.3	18.9	2/	-	-
Tea	.67	.55	.52	.55	.55	2/	-	-
Cocoa beans	4.4	4.0	4.2	4.2	3.7	2/	-	-
Peanuts (shelled)	4.4	6.4	5.0	4.7	4.3	2/	-	-

Population estimates used to obtain per capita consumption figures are official Census estimates of total population adjusted for underenumeration of children under 5 and for military personnel not eating out of civilian supplies.
1/ Revised. Data on calendar year basis except for dried fruits which are on a pack year basis; fresh citrus fruits and peanuts on a crop year basis, rice on August 1 year. All years begin in year indicated except for fresh citrus, which begins in October of the previous year and rice which begins in August of previous year. 2/ Not available. 3/ Excludes canned food products containing small quantities of fish such as clam chowder, etc. 4/ In terms of number of eggs, the apparent per capita consumption was 298 in 1935-39, 397 in 1945, 374 in 1946, 379 in 1947, 386 in 1948 and 383 forecast for 1949. 5/ Computed from unrounded data. 6/ Average 1937-39. Data prior to 1937 are not available. 7/ All barley food products in terms of malt equivalent. 8/ Includes white, whole wheat, and Semolina flour. 9/ Green bean basis.

COMMODITY REVIEWS

Meats:

Meat supplies are increasing seasonally this spring and will be somewhat larger than in the spring months of 1948. The principal factor in the larger meat supplies expected for the spring as well as for later months of 1949 is the increase in the number of hogs raised. From about April to early fall more pork will be produced than in mid-1948 because of the 8 percent increase in last fall's pig crop which will furnish the hogs for slaughter during this spring and summer. Also, more sows probably will be slaughtered this summer than last. The slaughter of fed cattle will continue high and is expected to reach its seasonal peak in the late spring. An unusually high proportion of beef supplies for the spring are the better grades that come from grain fed cattle.

For the year 1949 as a whole, consumption of meat per capita is likely to be at least as large as the average of 146 pounds for 1948. The increased supplies of pork and better grades of beef will be about offset by smaller supplies of lower grade beef, of veal, and of lamb and mutton. The decline in the output of lamb and mutton follows the trend of the past several years. Production of lamb and mutton in 1949 may be no larger than the mid-1920's and consumption per person may fall even below the previous low of 4.4 pounds in 1917.

During the first 3 months of 1949, meat production and consumption was approximately as large as in the comparable period of 1948. Heavy slaughter of fed cattle contributed materially to meat supplies in that quarter. The number of steers slaughtered generally exceeded any previous year except 1947. However, the slaughter of grass-fat cattle was smaller so total beef output approximated that of the opening months of 1948. Hog slaughter and pork production in the first 3 months were about equal to last year.

Prices of most meats and meat animals rose moderately in late winter following a major decline that began last summer. Prices of some meats have more recently declined somewhat. Fluctuations through the remainder of the year may conform more closely than last year to the usual seasonal pattern of a moderate rise in mid-summer and a moderate decline during the fall. Prices of lamb and mutton may hold generally higher than usual relative to other meats while prices of pork are likely to be comparatively lower.

Fish: 1/

Supplies of fishery products in the continental United States during the first quarter of 1949 were sufficient to maintain per capita civilian consumption at about the same rate as a year earlier. The net movement of frozen fish into domestic distribution channels during the January-March period was slightly larger than in the same months of 1948. Trade reports indicate that the flow of the major species of canned fish into consumer channels was more sluggish than in the first quarter of 1948. In March, the Bureau of Labor Statistics retail price index of fresh and frozen fish was 266.8, 5.6 points below January 1949 and 7.6 points below the near record level reached in March of last year. The reported retail price for pink salmon, however, averaged 61.1 cents during the first 3 months of the year, almost 20 percent above the corresponding quarter of 1948.

Favorable weather and wholesale market prices in the eastern part of the United States, especially in the New England and Middle Atlantic States, permitted more frequent fishing operations than is usual in the winter season and resulted in a larger supply for the fresh fish market than in the first quarter of 1948. During the winter season of 1949 the quantity of fish frozen commercially for eventual food use was more than 2.5 million pounds below the total of 25.5 million pounds produced during January-March 1948. As far as the consumer retail market was concerned, this decline in freezings was more than offset by larger net withdrawals of fish from cold storage. The reduction in cold storage stocks between January 1 and April 1, 1949 was approximately 7.5 million pounds greater than the decline of 54.0 million pounds during the same period last year.

The commercial catch and commercial freezing of fish for food use in the next few months is expected to increase seasonally. Cold storage stocks will reach their low point of the year during the April-June quarter.

Domestic supplies of the major species of canned fish appear to be as great thus far in 1949 as they were during the corresponding period last year. Present supplies are expected to be sufficient to meet consumer demand at prevailing prices until the new pack starts moving to market in volume during the second half of the year. Supplies of canned tuna and sardines (including pilchards) are larger this year than in the same months of 1948, while those of salmon are smaller. With a decline in retail prices of canned tuna, more tuna may be consumed and somewhat less of salmon.

Imports of frozen groundfish (cod, haddock, hake, pollock and cusk) and rosefish (i. e., ocean perch) fillets during January-March 1949, while about 5 percent below those of January-March last year, are still large. Canned fish imports have been increasing during the past year but as yet are not sufficiently large in volume to have any adverse affect on the price of the domestic products.

Export outlets for practically all fishery products of the United States have been very limited compared to the prewar and war years. Prospects for this year are not favorable for larger exports than in 1948 because of the continued shortage of dollar resources in foreign countries, the need for conserving a large part of these funds for machinery and equipment, and the continued ample supplies of fishery products in producing countries that are willing to conduct trade on the basis of soft currency or barter.

Poultry and Eggs:

United States civilian consumption of eggs in the first half of 1949 will be limited only by the demand which exists at prevailing prices. Current production is providing a surplus even after sustaining an apparent disappearance at a rate slightly above an egg a day per consumer. Thus far this surplus has been absorbed in the purchase program of the Department of Agriculture.

Farm egg production in the first four months of 1949 was one percent greater than in January through April of the preceding year. This current supply was accomplished by an increase in the production per layer which more than compensated for the fewer birds in farm flocks. If this high rate of lay is continued, and if culling is not accelerated, monthly egg production probably will continue near last year's level. The movement of eggs into cold storage this spring has been smaller than a year ago. With farm egg production during the spring months about as large as last year, more eggs will be available.

Egg production after August probably will exceed the comparable months of 1948. Even though cold-storage stocks of eggs for use in those months are expected to be small, the anticipated increase in the number of layers in farm flocks in the latter part of the year will bolster egg supply in the normal out-of-storage season.

In March 1949 the United States average retail price as computed by the Bureau of Agricultural Economics was 57.9 cents per dozen for eggs. This price was 4 percent under the price in March 1948. As compared with last March, egg prices at the farm level dropped less than prices at retail, and the farm-retail spread this March was 0.8 cents per dozen narrower than a year ago.

Poultry meat output in 1949 is expected to be larger than a year earlier. This situation is a result of feed prices being favorable for poultry production and the fact that farmers expect poultry prices to continue high. Most classes of poultry and particularly broilers, are currently selling below last year's levels. Despite the price disadvantage as compared with last year, total shipments from hatcheries until May 1 of broiler chicks to seven specialized broiler areas were 45 percent greater than in the corresponding period in 1948. Broiler supplies from these areas reach market approximately 13 weeks after the chicks are placed. In recent years, broilers are estimated to have provided between 25 and 40 percent of the annual poultry meat supply.

Turkey consumption will reach a seasonal low point during the second and third quarters. Cold-storage supplies carried over from 1948 were lower than in the preceding 3 years, but above prewar levels. For the year as a whole, supplies and probable consumption of turkey will be greater than in 1948, because of a likely 25 percent increase in 1949 production. In most years, more than a third of the turkeys raised is eaten in the same calendar year.

Dairy Products:

Supplies of most dairy products during 1949 will be larger than a year earlier. During the first quarter of the year, civilian consumption of butter and cheese was running substantially larger, while the consumption of fluid milk and ice cream was about the same as in the first part of 1948. The current level of consumer demand for the various products appears to have declined somewhat from the record of last summer but apparently is not much different from that in the early part of 1948. Price declines, occasioned by substantially larger supplies than a year earlier, and a weaker storage demand account for the increased civilian consumption of butter and cheese.

Production of milk on farms during the first four months of 1949 was larger than in January-April of 1948 by 3.5 percent or 1.2 billion pounds. Numbers of cows were down but the rate of milk produced per cow was at new record high levels reflecting mild weather and heavy feeding. Output per cow is likely to reach a new record this year but the increase over the previous high of 1948 will not be as great as the first few months of 1949 would suggest. Total milk production of 1949 will be somewhat above the 115.5 billion pounds produced in 1948.

With more milk produced on farms and with fluid milk consumption about the same as in 1948, the quantity of milk available for use in manufactured dairy products during the first quarter of 1949 was substantially larger than a year earlier. However, the utilization of this milk was quite different from that in early 1948. During the first quarter production of butter was greater than a year earlier by 19 percent, cheese by 21 percent and dry skim milk output was 46 percent larger than last year. On the other hand, evaporated milk production was 17 percent smaller and dry whole milk output was down 15 percent.

A substantial portion of the record holdings of evaporated milk accumulated last fall were still on hand at the beginning of 1949. Relatively large withdrawals from these holdings have permitted consumption of the products at slightly above the level of a year earlier, despite smaller production. Retail prices of evaporated milk have come down and in March averaged 13.7 cents per can in 56 cities compared with 15.8 cents at the peak last September and 14.0 cents in March 1948. Wholesale and retail prices for evaporated milk however have declined much less in recent months than have prices of milk at the farm level.

In January-March the average retail price of cheese in urban areas was 3 percent below the level of a year earlier and about 11 percent below the peak reached in the third quarter of 1948. Retail butter prices have declined along with wholesale butter prices and butterfat prices.

A seasonal increase in milk production during the second quarter of 1949 will tend to bring further reductions in prices for fluid milk and cream. According to the Bureau of Agricultural Economics in early April the average retail price of fluid milk (delivered to homes in 24 cities) was 20 cents per quart, about 0.5 cents below a year earlier and 1.5 cents (7 percent) below the peak of last September.

Butter prices have been at support levels in recent weeks. Through April, about 1.5 million pounds had been purchased by the U. S. Department of Agriculture under price-support programs. The purchase prices have been equivalent to announced support levels of 59 cents per pound for grade A (92-score) butter. Advanced procurement of dry skim milk through mid-April totaled 97 million pounds. On April 14, the Department announced that future purchases of dry skim milk will be on a fixed price basis, with the objective of helping to support prices for all milk used in manufactured products.

Fats and Oils:

The supply of food fats and oils probably will be somewhat larger this year than in 1948. Production of butter and lard is running substantially ahead of last year. The consumption of food fats and oils other than butter may decline somewhat this year despite the favorable supply

situation because of a moderate decline now anticipated in consumer incomes. Consumer demand for food fats and oils apparently has been falling off. In spite of the continuous decline in retail prices of these products after last July, disappearance in the latter half of 1948 was smaller than a year earlier. In January-March 1949, however, there was a slight increase above the same period of 1948. The BLS retail price index declined 23 percent in the period July 1948 to March 1949.

Consumption of butter in the United States probably will increase in 1949, because production is expected to increase and the price, until the fall months, probably will continue well below the high level of last spring and early summer. Butter prices averaged 74.2 cents per pound at retail in the first quarter of this year compared with 90.2 cents per pound a year earlier. Production of creamery butter in January-March 1949 was about 21 percent larger than a year earlier. Output of butter in the rest of 1949 probably will be 15 percent higher than in the year before. Total milk production is running above last year and less milk is expected to be used in fluid form or in ice cream. With not much change in other uses, this would leave more milk available for butter production than last year.

Lard supplies are materially larger this year. The production of federally inspected lard in January-March 1949 totaled 529 million pounds, 19 percent more than a year earlier. More hogs were slaughtered and the yield of lard per hog was higher than in 1948, in fact it was the highest since 1926. Hog slaughter and lard production this spring and summer are expected to increase over the 1948 rates because of the 8 percent increase in the number of pigs saved last fall. Output of lard next fall and winter may increase still more compared with a year earlier, as an increase of 14 percent has been indicated in the number of sows farrowing in the present spring season.

Production of margarine (almost entirely for domestic consumption) in the first quarter of this year was nearly as large as in the same months of 1948. In January and February 1949 production was 6 percent smaller than a year earlier. For March, however, output was 10 percent larger than in March 1948.

Reflecting the bumper crops of cottonseed and soybeans harvested in 1948, total production of vegetable oils used chiefly for food production will be substantially larger in the first six months of 1949 than a year earlier. Yields per acre were so exceptionally high last year that somewhat smaller yields are to be expected in 1949. With farmers' intentions on March 1 indicating a slight decline in soybean acreage, production will be smaller. Total output of edible vegetable oils in July-December 1949 will depend mainly on the size of the oilseed crops harvested next fall. The first official estimate of the 1949 cottonseed acreage will be made in early July.

Factory and warehouse stocks of food fats and oils, including vegetable oils used in food products, totaled 867 million pounds on January 1 compared with 704 million pounds a year earlier. This increase was mainly the result of a large increase in production in the fall of 1948 compared with a year earlier.

Exports of food fats and oils in 1949, including oil equivalent of soybeans and peanuts for crushing abroad, probably will be substantially larger than the 694 million pounds exported in 1948. Limitations on quantities which may be exported from the United States were removed in February 1949. Export demand for food fats and oils is expected to remain strong. The Economic Cooperation Administration recently indicated that the total tonnage of imports of fats and oils into Europe in 1949-50, financed by ECA dollars, probably would be 10 percent larger than in 1948-49. In April-December 1948, an estimated 34 percent of the total value of all exports of fats, oils and oilseeds from the United States were financed by ECA dollars. An additional 6 percent was paid for by funds provided by the military services for relief feeding in the occupied areas. Most of the fat-and-oil items financed by ECA and the Army were in the food category.

Retail prices of food fats and oils continued to decline from January through March 1949. Declines in wholesale prices continued in March, and by early April were lower than they had been since ceiling prices were removed in October 1946. In late April, however, wholesale prices increased moderately.

The retail price of butter in urban areas in March 1949, 73.4 cents, was 15 percent lower than it was in March 1948, however, as the wholesale price of butter was near the price support level, there is not much possibility of a further decline in the retail price. The Department of Agriculture announced on February 8, 1949 that the wholesale price of butter would be supported at 59 cents per pound until September 1 and at 62 cents per pound in the rest of 1949. These supports are considerably lower than the wholesale price of butter in most months before October 1948. In March 1949, lard was selling at 19.6 cents, margarine at 33.1 cents, shortening at 36.6 cents. Compared with the same month last year, the price of lard was down 31 percent, that of margarine had dropped 19 percent and the price of shortening was 18 percent lower.

Table 4.- Retail price per pound of butter, margarine, lard, shortening and per pint of salad dressing, leading cities of United States, in specified periods

Item	1924-29 average	1937-41 average	1945 1/	1947	1948	Jan. 1949	Feb. 1949	Mar. 1949
	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents
Butter	55.0	37.0	50.7	80.5	86.7	75.0	74.1	73.4
Margarine	28.7	17.3	24.1	48.8	41.4	36.3	34.0	33.1
Lard	19.8	12.6	18.8	31.5	29.6	24.3	19.9	19.6
Shortening 2/	24.7	20.4	24.6	44.4	44.0	40.9	38.8	36.6
Salad dressing	n.a.	n.a.	25.1	38.5	39.6	38.6	37.8	36.7

1/ Representative of the wartime level under price ceilings.
2/ In containers other than cartons. This is chiefly hydrogenated shortening.

Bureau of Labor Statistics.

Fruits:

Supplies of fresh fruits will continue smaller during the late spring than a year earlier, however, summer supplies will be larger than in 1948. For most of the processed fruits, supplies continue large. Retail prices of most fruits are higher this spring than last.

Less than the usual quantity of fresh apples and pears are available this spring because of smaller crops in 1948 and a relatively heavy early season shipment to market. Supplies of fresh strawberries are expected to be a little larger in May but moderately smaller in June than in the same months of 1948. Cold, wet weather reduced the size of the early spring crop below earlier expectations, and prices were about the same as in the early spring of 1948. For the late spring crop, prices are expected to be about the same as a year earlier.

The unfavorable weather for citrus fruits this past winter -- severe cold in California, Arizona and Texas, and warm dry weather in Florida -- considerably reduced the size of the 1948-49 citrus crop. In addition, it resulted in the harvest in Texas being practically completed by the first of April, about two months earlier than usual; the season for Florida oranges and grapefruit will end a little earlier than usual. As of early May the remaining fresh citrus supplies were lower than a year earlier; grapefruit by about 58 percent, oranges by 14 percent, and lemons by 39 percent. From June until about October, most of the fresh citrus on the market will be from California. Retail prices of oranges, grapefruit and lemons have been considerably higher this spring than the relatively low prices in the corresponding period of 1948. These high prices are expected to continue this summer.

Supplies of canned fruit in the spring months of 1949 are sufficient to sustain civilian per capita consumption of these products at or above the rate of a year earlier. Total stocks of canned apricots, peaches, pears, pineapples and fruit cocktail at the packer and wholesale distributor levels on March 1 were about 36 percent larger than similar stocks on March 1, 1948. Packer stocks this year were about twice those of March last year, but distributor stocks were 15 percent smaller.

With the season for processing citrus fruits well advanced on April 1, it seems almost certain that the total pack of canned citrus juices from the 1948-49 crop would be somewhat smaller than the 1947-48 pack. On the other hand, the new pack of canned citrus segments already is slightly larger than last year's pack.

Stocks of frozen fruits, berries and fruit juices on May 1 were about 4 percent smaller than on the same date in 1948. However, supplies are large enough to maintain civilian per capita consumption at last year's rate until the new pack starts coming to market. Stocks of frozen strawberries and fruit juices -- especially frozen concentrated orange juice -- are much larger than a year earlier, while those of the other commodities are either the same or lower.

Dried fruit supplies especially prunes and raisins are expected to continue ample. Per capita civilian consumption of dried fruit is not expected to be much different from last year. Retail prices this year have been somewhat higher than in 1948. According to the Bureau of Labor Statistics, prunes retailed at 22.8 cents per pound in March 1949 as compared with 21.5 cents per pound a year earlier.

Prospects are favorable for larger supplies of fruit this summer than last. Except in some of the southern peach States and in the Pacific Northwest, deciduous fruit trees and vines came through the winter and early spring in generally good condition. However, trees and vines in some areas still face late spring weather, which will have a marked bearing upon the set and final yield of fruit. With average weather, total output of deciduous fruits will be somewhat larger than in 1948. Production of apples, pears and peaches may exceed the last year's short crops. Judged by May 1 conditions, the peach crop in 10 Southern States, which usually furnish from one-fourth to one-third of the national crop, will again be small this year -- 19 percent below the 1938-47 average but 5 percent above 1948 production.

Vegetables:

Supplies of fresh and processed vegetables during the first half of 1949 are expected to permit civilian per capita consumption of these commodities at about the same rate as a year earlier. Supplies of potatoes, dry edible beans and dry field peas are ample, but fewer sweetpotatoes will be available than during the January-June 1948 period.

Production of commercial truck crops for fresh shipment during the first part of 1949 was 11 percent below that in the same period last year. However, with large carry-over stocks of cabbage, carrots and onions on January 1, civilian consumption of fresh vegetables was only slightly lower than a year earlier. Retail prices averaged somewhat below those of the first quarter of 1948.

Prospective supplies of commercial fresh vegetables for the spring season of 1949 are likewise expected to total about the same as in the same months of last year. Indications are favorable for considerably larger spring season crops of asparagus, beets, cabbage, Honey Ball melons, and lettuce, than a year ago. However, a large reduction is expected for lima beans, cauliflower, eggplant, green peas, green peppers, onions, and shallots. On the average, retail prices of fresh vegetables are expected to be about the same as in the corresponding period of 1948.

Supplies of commercially canned and frozen vegetables are sufficient to cover consumer needs until the 1949 packs start moving to market in volume in the latter half of the year. Among the major canned items, January 1, 1949 stocks of sweet corn, tomatoes and tomato juice were somewhat higher, while those of peas were lower, than stocks on January 1, 1948. For the major commercially frozen vegetables, January 1, 1949 stocks of snap beans and lima beans were higher than a year earlier but stocks of frozen corn, peas, and spinach were somewhat lower.

Civilian consumption of canned and frozen vegetables in 1949 is expected to continue at about the same rate as in 1948. Supplies are expected to be adequate to meet the anticipated demand. Early reports to the BAE from commercial processors indicate intentions to plant or contract for planting in 1949 considerably larger acreages this year than last in pimientos, spinach, beets, and snap beans, and slightly to moderately larger acreages of green peas and cucumbers for pickles. On the other hand, processors intend to reduce plantings of tomatoes, sweet corn, and cabbage under contract for kraut. These planting intentions reflect the probability of another large commercial pack of canned and frozen vegetables in 1949.

Adequate supplies of potatoes are in prospect. Stocks on March 1 were 9 percent greater than a year earlier. Production of commercial early potatoes for late spring marketing is 12 percent smaller than in 1948 but one-fourth larger than the 1938-47 average. Most of these potatoes will be harvested and marketed a little later than usual this year. Retail prices this spring may be somewhat lower than last year.

Farmers' intentions in March indicated that total acreage planted to potatoes this year might be about 7 percent smaller than in 1948. This prospective acreage, assuming 1946-48 average yields by States, would produce a moderate surplus above probable demand at support prices. Government price-support purchases of 1948 crop potatoes, though not yet complete, totaled approximately 124 million bushels through May 2. Purchases of the 1949 (new crop) potatoes through the same date was about 515,000 bushels.

Sweetpotato supplies will continue smaller than last year at least until the new crop begins coming to market in volume in the late summer of 1949. The 1948 crop, part of which was consumed during the following winter and spring season, was one-tenth smaller than the 1947 crop, a fourth below the 1937-46 average, and the smallest since 1924. The large amount of labor required for growing this crop, the lack of a good marketing system in many areas, the sweetpotato weevil infestation in Louisiana, and the opportunity to grow better-paying crops are some of the factors which have caused a shift to alternative crops in many growing areas. With smaller supplies of sweetpotatoes, retail prices in leading cities have averaged slightly higher than a year earlier in each month since October 1948. Little change in retail price is anticipate until the 1949 crop starts moving to market.

Sweetpotato consumption per capita in 1949 probably will be smaller than last year. Farmers' planting intentions on March 1 point to a further reduction in sweetpotato acreage this year. If these intentions materialize, the acreage would be less than a half million acres for the first time since 1886. The heaviest reduction is expected to be in the South Central States which produce most of the sweetpotatoes that are cured and stored for marketing during the winter and spring season of the following year.

Supplies of dry edible beans in the 1948-49 marketing season have been considerably in excess of demand at support prices. The crop in 1948 was very large, and with a decline in military and foreign demand, the carry-over stocks of beans on January 1, 1949 were large. Although per capita consumption in 1949 may increase somewhat in response to lower retail prices, Government purchases of 1948 crop dry edible beans for export have been heavy and further large acquisitions are expected to be made for price support under the loan and purchase agreement programs.

Although March 1 intentions of farmers indicated the probability of a 7 percent reduction in acreage planted to dry edible beans this year, with no increase in commercial exports anticipated, dry bean supplies may again exceed total commercial demand in 1949-50. Retail prices of 1949 crop beans probably will be somewhat lower than those from the 1948 output, as the support level is somewhat lower.

The 1948 crop of dry field peas was smaller than for the preceding year. The total foreign and domestic demand for peas also was smaller than in 1947-48 crop year. As a result, even with reduced output, supplies were in excess of demand. Indications are that this surplus situation will be carried over into the 1949-50 crop year since farmers' March 1 intentions to plant point to an acreage about a third higher in 1949 than a year earlier.

Food Grains:

Supplies of cereal products for domestic consumption continue plentiful. Prices to growers are expected to decline somewhat when the large crops in prospect are harvested. As a result flour prices may decline, but no major price adjustments in bread, breakfast cereals and rice are expected in the very near future.

Wheat food consumption in 1948-49 is below that of the preceding year, a trend since 1944. The total use for civilian food in 1948-49 is estimated at about 479 million bushels, which compares with 491 million a year earlier. Military food use may total about 6 million bushels. Because of the very plentiful supplies of feed grains and lower prices relative to wheat, the quantity of wheat fed to livestock may be only about 100 million bushels, compared with the prewar (1932-41) average of 122 million and 488 million in the record high year of 1943-44. Seed use is estimated at 91 million and exports at 500 million. With total supplies for the 1948-49 year of 1,484 million bushels, consisting of July 1 stocks of 196 million and production of 1,288 million bushels, the carry-over July 1, 1949 is estimated at 300-325 million bushels. This compares with the 235 million average for 1932-41 and 631 million in 1942.

A winter wheat crop of 1,021 million bushels was indicated as of May 1. Production of spring wheat will not be officially indicated until June. If yields per seeded acre should equal the 1938-47 average on the prospective spring acreage, about 290 million bushels would be produced. This would give a total wheat production of 1,312 million bushels, second only to the 1,367 million produced in 1947. With a domestic use of about 670 million bushels, a crop of this size would provide about 640 million bushels for export in 1949-50 and for addition to the carry-over July 1, 1950.

Rye supplies in 1948-49, at about 34 million bushels, are the largest since the 38.2 million in 1945-46. While July 1 stocks were only 3.3 million and production only 26.4 million bushels, imports may total about 5 million bushels. Prices in the United States are sufficiently high to attract imports. Domestic disappearance is expected to total about 23 million bushels (food 5, feed 6, seed 5, and alcohol and spirits 7), and exports about 8 million. On this basis, the carryover July 1, 1949 is expected to be about 4 million bushels. This is slightly above the very low stocks a year earlier. A crop of 21.6 million bushels was indicated as of May 1 condition, which is smaller than the 26.4 million bushels in 1948. A reduction in production, however, will not reduce food use in 1949-50, which is expected to continue at about the 1948-49 level of 5.4 million -- about a fifth below the average of 6.8 million bushels consumed in 1935-39.

Civilian food use of rice from the 1948 production is expected to continue below the 1934-38 crop year average of 5.6 pounds per capita. However, it may be somewhat above the 4.9 pounds per capita in 1947-48. United States supplies of rice (in terms of milled) in 1948-49 totaled over 24,300 thousand 100-pound bags, an all-time record. Stocks at the beginning of the year were equivalent to only 260 thousand bags, but the crop was 23,860 thousand bags, exceeding the previous record of 22,990 thousand bags in 1947. Civilian food use from the 1948 crop is expected to be somewhat higher than the 7,070 thousand bags thus utilized in the preceding year. Seed and feed use will take about the same as the 1,370 thousand bags used from the 1947 crop, while brewers will use substantially less broken rice than the 2,030 thousand bags used in 1947-48. Shipments to United States noncontiguous territories are expected to continue at about 3,200 thousand bags. Exports will continue at a high level for the rest of the marketing year, but there is some likelihood that the year-end carryover from the 1948 crop will be larger than the nominal amounts of recent years.

The prospective acreage of rice is estimated at 1,753,000 acres this year, or slightly smaller than the 1948 record plantings of 1,757,000 acres. If the intended plantings materialize and yields per acre equal the 1942-47 average, this year's rice production will amount to about 79 million bushels, or about 2 million bushels below last year's record crop. Rice prices before the new harvest are not expected to change much. Export prospects may be less favorable in 1949-50 and this could result in somewhat lower prices to growers than for the 1948 crop. No significant change, however, is expected in retail rice prices in the near future.

Supplies of corn, oats, and barley from the big 1948 crops are ample for domestic requirements and exports through the first half of 1949. During the first quarter of 1949 domestic disappearance of these grains for all uses was 8 percent larger than a year earlier. Stocks remaining on April 1 were much larger than in any previous year and 89 percent larger than the small stocks on April 1 last year. Larger domestic use and export are in prospect for the remainder of the season than a year earlier. The carryover into 1949-50 is expected to be the largest on record.

Supplies in 1949-50 will again be relatively plentiful if the 1949 growing season is about average. Including the big carryover of corn in prospect, the corn supply, with an average growing season, would be a little smaller than in 1948, but larger than in any other year on record. The oat supply also will be larger than in most otheryears, while the barley supply would be below most of the past ten years, but larger than before the war.

Processing of corn for food so far during the current marketing year has been a little larger than a year ago, reflecting lower corn prices and the much larger supply. The quantity processed by the wet-processing industry, which produces starch, sugar, and sirup, was about 8 percent larger in January-March this year than last. Prices of corn products declined in the last half of 1948 following the sharp drop in corn prices and continued substantially lower than a year earlier through the first quarter of 1949. In March the wholesale price of corn starch in New York was 24 percent lower than a year earlier, and sugar and sirup prices were 16 percent lower. The price of corn meal in the first quarter of this year had been about one-third lower than a year earlier. Prices of these products are expected to continue considerably lower than a year earlier, at least through the first half of 1949.

Supplies of oats and barley are fully adequate for domestic food requirements until the 1949 crop is processed. Prices of these products also have declined, reflecting the lower prices of oats and barley than a year ago. The wholesale price of malt in March was about 30 percent lower than a year earlier. Prices of oatmeal and malt are expected to continue substantially lower than a year earlier through the first half of 1949, although they will be influenced to some extent by prospects for the 1949 oats and barley crops.

Exports of corn will be much larger in the first half of 1949 than in that period of 1948, and some increase in exports of oats and barley is in prospect. Exports of corn probably will total around 75 million bushels, compared with only about 4 million bushels in the first half of 1948.

Sugar:

The total amount of sugar consumed by civilians in the United States in 1948 is currently estimated at 7,500 thousand tons (raw value), an all-time record, and is equivalent to a per capita consumption of about 96 pounds (refined value). This per capita consumption was about 4 pounds higher than in 1947, and approximated the prewar level. Civilian consumption in 1949 will continue high, although probably somewhat below 1948 levels.

Sugar production in the principal areas supplying the United States market, that is the domestic mainland and insular areas, Cuba and the Philippines, is expected to total 10,884 thousand tons in the 1948-49 crop year, only 4 percent below the record production in 1947-48. Although present economic conditions are favorable to an increase in acreage planted to sugar beets this spring, the March prospective plantings report indicates a 4 percent decrease. When this survey was made, however, sugar beet processors in the Western States had not yet completed their drives to obtain acreage under contract. In addition, considerable replanting of acreage damaged as a result of unfavorable weather is taking place in California. These factors may cause a rise in acreage over that indicated in farmers' prospective planting plans as of March 1.

In general, prices in the first quarter in 1949 have been averaging higher than in the same period in 1948. The average wholesale raw and refined sugar prices in New York of 5.68 and 7.96 cents per pound in March compare with the prices of 5.42 and 7.75 cents that prevailed in March 1948. Since prospective sugar supplies in the United States are lower relative to consumer demand than in 1948, the domestic sugar market is expected to be firmer in 1949 than in 1948, unless there are appreciable changes in the underlying supply and demand factors.

Table 5.- Planted acreage of major crops, 1935-39 average, 1948, goals for 1949 and prospective plantings for 1949, with percentage comparisons

Crop	Planted acreage: 1935-39 average	Planted acreage: 1948	1949 goals	Prospective plantings 1949 1/	Prospective 1949 as percentage of: 1935-39 average	Prospective 1949 as percentage of: 1948	Prospective 1949 as percentage of: 1949 goal
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	Percent	Percent	Percent
Total 2/	326,679	337,638		335,532	103	99	---
Corn, all	97,044	86,196	85,900	84,809	87	98	99
Wheat, all	73,256	77,749	71,850	81,670	112	105	114
Winter	51,577	58,161	---	61,370	119	106	---
Spring, all	21,659	19,588	---	20,300	94	104	---
Oats	40,591	44,529	44,750	44,506	110	100	99
Barley	13,365	13,295	13,500	11,885	89	89	88
Flaxseed	1,938	4,889	3,022	4,713	243	96	156
Rice	1,007	1,757	1,600	1,753	174	100	110
All sorghums	15,254	13,813	---	12,144	80	88	---
Sorghums, all excl. sirups	15,029	13,703	13,704	*12,034	80	88	88
Potatoes	3,123	2,127	1,938	1,980	63	93	102
Sweetpotatoes	804	519	607	489	61	94	81
Tobacco 3/	1,647	1,538	4/	1,596	97	104	---
Beans, dry, edible	1,917	1,971	1,800	1,834	96	93	102
Peas, dry field	281	309	350	409	146	132	117
Soybeans for beans 3/	3,042	10,311	10,273	5/9,774	321	95	95
Soybeans, grown alone 6/	7,262	11,733	---	11,278	155	96	---
Cowpeas, grown alone 6/	3,165	1,115	---	1,011	32	91	---
Peanuts, picked and threshed 3/	1,659	3,214	7/	8/2,585	156	80	---
Peanuts, grown alone 6/	2,173	3,879	---	3,175	146	82	---
Hay, all 3/	67,940	73,616	9/75,979	75,718	109	100	96
Sugar beets	891	800	10/	766	86	96	---

1/ From March 1949 Prospective Plantings Report and December 20, 1948 Winter Wheat and Rye Report.
2/ Includes all wheat, soybeans for beans, peanuts picked and threshed, and sorghums all excluding sirup.
3/ Harvested acreage.
4/ Marketing Quotas announced. No goals established.
5/ 1949 indicated solid equivalent acreage adjusted for the percentage harvested for beans by using the 1947-48 average percentages, by States.
6/ For all purposes.
7/ Acreage allotments announced. No goals established.
8/ Assuming the usual relationship of acreages planted alone to acreages for picking and threshing, by States.
9/ Goal acreage for Tame Hay adjusted to the All Hay level by addition of the 1948 Wild Hay acreage in the 22 States where estimated.
10/ Sugar Act of 1948 applicable.

* All sorghum acreage (B. A. E. Prospective Plantings Report) less 1948 acreage harvested for sirup, by States.

Table 6.- Prospective and actual acreages planted in major crops, 1946-48, with percentage comparisons 1/

Crop	1946			1947			1948		
	Prospective	Actual	As percentage of prospective	Prospective	Actual	As percentage of prospective	Prospective	Actual	As percentage of prospective
	1,000 acres	1,000 acres	Percent	1,000 acres	1,000 acres	Percent	1,000 acres	1,000 acres	Percent
Total	288,969	285,600	99	284,295	279,802	98	281,673	281,674	100
Corn, all	92,993	89,788	97	87,599	86,108	98	86,131	86,196	100
Spring wheat	18,961	19,341	102	19,280	20,036	104	19,789	19,588	99
Oats	46,444	46,549	100	46,620	42,301	91	45,709	44,529	97
Barley	11,521	11,527	100	11,714	12,102	103	12,660	13,295	105
Flaxseed	3,497	2,641	76	4,488	4,161	93	4,401	4,889	111
Rice	1,575	1,586	101	1,619	1,703	105	1,666	1,757	105
All sorghums	14,787	14,749	100	13,109	11,746	90	12,983	13,813	106
Potatoes	2,738	2,645	97	2,310	2,136	92	2,162	2,127	98
Sweetpotatoes	712	682	96	664	611	92	560	519	93
Tobacco 2/	1,954	1,963	100	1,908	1,845	97	1,528	11,538	101
Beans, dry edible	1,673	1,697	101	1,889	1,839	97	1,811	1,971	109
Peas, dry field	462	521	113	589	551	94	470	309	66
Soybeans 3/	11,840	11,662	98	12,213	12,956	106	11,659	11,733	101
Cowpeas 3/	1,468	1,215	83	1,116	1,138	102	1,039	1,115	107
Peanuts 3/	3,759	3,917	104	3,847	4,112	107	3,988	3,879	97
All hay 2/	4/ 73,652	74,173	101	4/74,337	75,489	102	4/74,215	73,616	99
Sugar beets	933	904	97	993	968	97	902	800	89

1/ Based on the prospective planted acreages indicated by farmers' reported March 1 intentions.
2/ Acreage harvested.
3/ Grown alone for all purposes. Partly duplicated in hay acreage.
4/ Includes wild hay harvested in 22 Western States, to be comparable with actual acreage data.

Table 7.-Production of major food commodities, calendar years, 1935-39 average, 1946, 1947, 1948, and preliminary indications for 1949 with percentage comparisons 1/

Commodity	Unit	Average 1935-39	1946	1947	1948	Preliminary indications for 1949	1949 as a percentage of 1935-39	1949 as a percentage of 1948
Meats (carcass weight)								
Beef	Mil.lb	6,937	9,373	10,428	9,181	9,200	133	100
Veal	do	1,038	1,440	1,599	1,419	1,325	128	93
Lamb and mutton	do	870	970	802	753	620	71	82
Pork (excluding lard)	do	7,337	11,173	10,601	10,246	11,000	150	107
Total meats	do	16,182	22,956	23,430	21,599	22,145	137	103
Fish (edible weight)								
Fresh and frozen	do	615	759	754	2/	2/	-	-
Canned 3/	do	337	464	483	2/	2/	-	-
Cured	do	74	63	63	2/	2/	-	-
Total fish	do	1,026	1,286	1,300	2/	2/	-	-
Poultry and eggs								
Eggs	Mil.doz	3,335	5,098	5,065	5,057	5,150	154	102
Chicken (dr. wt.)	Mil.lb	2,327	3,597	3,497	3,268	3,500	150	107
Turkey (dr. wt.)	do	350	687	606	509	610	174	120
Dairy products								
Total milk 4/	do	106,450	122,539	121,891	118,337	120,300	113	102
Cheese 5/	do	669	1,101	1,178	1,097	1,200	179	109
Cond. and evap. milk	do	2,225	3,333	3,630	3,831	3,425	154	89
Fats and oils								
Butter, farm & factory (actual weight)	do	2,170	1,505	1,646	1,513	1,675	77	111
Lard 6/	do	1,630	2,138	2,427	2,328	2,400	147	103
Margarine (fat content)	do	303	465	606	735)			
Shortening	do	1,529	1,451	1,374	1,426)	3,650	152	107
Other edible fats and oils 7/	do	575	677	1,070	1,257)			
Total fats and oils 8/		6,207	6,236	7,123	7,259	7,725	124	106
Fruits								
Fresh:								
Citrus	do	6,875	9,296	9,992	8,672	8,100	118	93
Apples (commercial)	do	4,385	3,936	3,937	3,185)	9,300	102	114
Other (excl. melons)	do	8 4,703	5,573	5,513	4,989)			
Processed:	do							
Canned fruit	do	1,705	3,094	2,648	2,535	2,600	152	103
Canned fruit juices	do	333	2,442	2,205	2,536	2,200	661	87
Frozen	do	106	525	352	396	440	415	111
Dried	do	1,118	1,014	1,153	891	2/	-	-

- Continued

Table 7.-Production of major food commodities, calendar years, 1935-39 average, 1946, 1947, 1948, and preliminary indications for 1949 with percentage comparisons 1/ - Continued

Commodity	Unit	Average 1935-39	1946	1947	1948	Preliminary indications for 1949	1949 as a percentage of 1935-39	1949 as a percentage of 1948
Vegetables								
Fresh 9/	Mil.lb	30,520	38,946	35,839	37,874	38,000	125	100
Canned 10/	do	4,030	7,640	6,131	5,767	6,000	149	104
Frozen	do	11/ 78	450	345	446	450	577	101
Potatoes	Mil.bu	356	484	389	446	12/382	107	86
Sweetpotatoes	do	68	66	56	50	12/ 45	66	90
Dry edible beans 13/	Mil.lb	1,360	1,474	1,604	1,955	12/1,500	110	77
Canned baby foods	do	48	462	353	489	466	971	95
Sugar, raw basis	1,000 sh.tons	1,948	1,900	2,158	1,917	2,100	108	110
Grains								
Wheat	Mil.bu	759	1,153	1,367	1,288	1,312	173	102
Rye	do	44.9	18.9	26.0	26.4	21.6	48	82
Rice, milled	Mil.lb	1,340	2,044	2,207	2,299	2,386	178	104
Corn, grain only	Mil.bu	2,050	2,951	2,137	3,365	2,600	127	77
Oats	do	1,045	1,498	1,199	1,492	1,300	124	87
Barley	do	239	262	281	317	267	112	84
Peanuts	Mil.lb	1,229	2,038	2,183	2,268	2/	-	-

1/ Calendar year basis except for fresh citrus fruit for which the season begins in the fall of the previous year; dried fruits which are on a pack-year basis; rice on a marketing year. 2/ Not available. 3/ Excludes canned food products containing small quantities of fish such as clam chowder, etc. 4/ The production of total milk includes total farm production of milk and off-farm production. 5/ Excluding full skim, cottage, pot, and bakers' cheese. 6/ Excluding amount used in manufactured products. 7/ Represents fats used in cooking and salad oils, salad dressing, mayonnaise, bakery products and other minor uses such as fish canning. 8/ Fat content basis except for butter which is on an actual weight basis. 9/ Estimates of all vegetables and melons other than potatoes and sweetpotatoes include reported commercial production for fresh market shipment plus rough estimates of quantities produced in market gardens for fresh sale and farm gardens for home use. Excludes town garden production. 10/ Includes asparagus, beans (lima), beans (snap), beets, carrots, corn, hominy, kraut (including bulk), peas, pickles (including bulk), pimientos, Irish potatoes, sweetpotatoes, pumpkin and squash, tomatoes, tomato pulp and tomato juice, tomato sauce, paste, and catsup and chili sauce, mixed vegetables. 11/ Average 1937-39. Data prior to 1937 are not available. 12/ Estimate is based on March acreage intentions of farmers and assumes average yield, by States, for recent years. 13/ Cleaned basis.

Table 8. - Retail food prices and total consumer price index, United States 1940-46 and 1947-48 by months
(Index numbers 1935-39 = 100)

Year and month	Meats 1/	Eggs	Dairy products 2/	Fats and oils 3/	Cereals and bakery products	Fruit and vegetables: Fresh	Fruit and vegetables: Canned	Fruit and vegetables: Dried	Sugar and sweets	Beverages	All foods	Consumer price index
1940	96	94	101	82	97	97	92	101	97	92	97	100
1941	108	112	112	94	98	104	98	107	106	102	106	105
1942	126	136	125	120	105	133	122	136	126	122	124	116
1943	134	162	135	126	108	178	131	159	127	125	138	124
1944	130	153	134	123	108	177	130	166	126	124	136	126
1945	131	164	134	124	109	188	130	168	126	125	139	128
1946	161	169	165	152	125	191	141	190	144	140	160	139
1947	217	201	186	198	155	202	166	264	180	187	194	159
Jan.	199	182	190	202	143	184	174	269	176	178	184	153
Feb.	197	170	183	201	144	189	173	270	178	183	182	153
March	208	175	188	219	148	199	173	271	179	187	190	156
April	203	176	179	228	153	201	173	270	179	190	188	156
May	204	179	172	200	154	210	172	268	179	189	188	156
June	217	183	172	188	155	208	170	263	180	181	190	157
July	220	203	179	182	155	204	168	264	180	181	193	158
Aug.	228	212	184	178	156	202	166	263	180	182	196	160
Sept.	241	236	195	177	158	202	157	261	181	187	204	164
Oct.	236	233	190	190	160	201	155	256	182	191	202	164
Nov.	227	225	198	196	168	205	156	252	183	195	203	165
Dec.	227	236	205	208	170	212	158	255	184	198	207	167
1948	246	209	205	196	171	212	158	247	174	205	210	171
Jan.	238	214	206	209	173	216	158	257	183	202	210	169
Feb.	225	189	204	194	172	222	158	256	177	204	205	168
March	225	186	201	192	171	214	158	254	174	204	202	167
April	234	185	206	191	171	228	156	252	174	204	208	169
May	244	185	205	197	171	229	156	250	173	205	211	170
June	255	194	206	200	171	225	157	248	171	205	214	172
July	262	204	209	201	171	223	158	248	171	205	217	174
Aug.	267	220	211	198	171	205	158	249	172	205	217	174
Sept.	265	227	209	197	171	200	159	249	173	206	215	174
Oct.	256	239	203	193	170	197	159	238	173	206	212	174
Nov.	247	244	200	189	170	192	159	231	173	206	208	172
Dec.	241	217	199	184	170	196	159	230	173	208	205	171
1949												
Jan.	236	210	196	175	170	213	159	228	173	209	205	171
Feb.	221	180	192	160	170	225	159	225	174	209	200	169
March	230	180	190	155	170	226	158	228	176	208	202	170

Index numbers from Bureau of Labor Statistics and rounded to the nearest whole number by Bureau of Agricultural Economics.

1/ Includes chicken and fish.
2/ Includes butter.
3/ Excludes butter.

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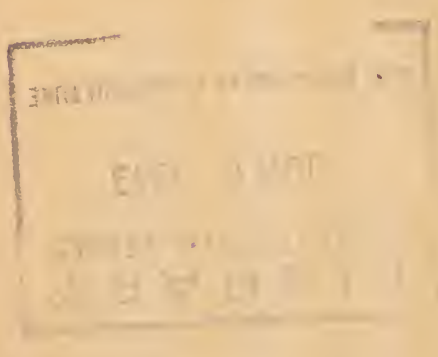

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THE National Food SITUATION

BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

NFS-49 BAE JULY - SEPT 1949

Approved by the Outlook and Situation Board, July 28, 1949

SUMMARY

Food supplies in the United States during the remainder of the year are expected to be somewhat above the level in the same period of 1948 and will continue high compared with the 1935-39 average. Retail food prices in general may show little change from present levels until fall, when some decline is anticipated. In comparison with recent months, seasonally larger supplies of chicken and turkey, fresh fruits and vegetables, sweetpotatoes, dry beans and peas, and rice will be on the market. On the other hand, supplies of meat (until the fall season), eggs and dairy products are likely to be seasonally smaller.

Per capita food consumption by United States civilians in 1949 probably will not be much different from last year, but 10 percent above the 1935-39 level. Increases from the 1948 rate are expected in the consumption of pork, better grades of beef, chicken, turkey, fresh fruits other than apples and citrus, canned fruits, butter, cheese, evaporated milk, condensed milk, and some corn products. Some decreases in the 1949 rates of consumption are anticipated for the lower grades of beef (more than offsetting the probable increase in better grades), veal, lamb and mutton, eggs, fresh citrus fruits, canned citrus juices, ice cream, and fresh vegetables. For other foods, not much change from the 1948 consumption rate is expected.

Civilian per capita consumption of food in 1949 will be above the 1935-39 prewar level for all major commodities except lamb and mutton, fresh fruits other than citrus, dried fruit, potatoes, sweetpotatoes, dry edible beans, butter, shortening, sugar, and some of the grain products.

The general level of retail food prices in 1949 is expected to average lower than last year, but economic activity this year is expected to continue sufficiently high to maintain consumer income and purchases at a high level. Food exports from the United States in 1949 are likely to remain large, but will be smaller than a year ago.

In this issue:

A special article, "Cereal Food Enrichment in the United States, 1946-48" begins on page 17.

Table 1.-Volume of agricultural production for sale and for farm home consumption and civilian per capita food consumption, 1943-48 and preliminary estimates for 1949, with percentage comparisons

(Index numbers, 1935-39 = 100)

Item	1943	1944	1945	1946	1947	1948	1949 Prel.	1949 as a percentage of 1948
Food grains 2/	116	148	155	164	197	184	171	93
Truck crops 3/	124	137	142	158	141	142	135	95
Fruits and nuts 4/	108	123	112	133	127	122	122	100
Vegetables, excluding truck crops 5/	125	106	110	128	107	123	104	85
Sugar crops 6/	81	81	94	103	110	89	92	103
Total food crops 1/	116	129	130	145	147	144	135	94
Meat animals 8/	149	155	147	145	145	134	135	101
Poultry 9/	162	166	170	160	157	153	168	110
Dairy products 10/	113	115	119	119	117	114	116	102
Total food livestock	140	144	142	139	138	131	135	103
Food production	134	140	139	140	140	134	135	101
Agricultural production, food and non-food	129	137	134	137	136	138	138	100
Civilian per capita food consumption	109	112	114	119	115	111	110	99

1/ Production estimates are based on preliminary crop indications as of July 1, and estimated marketings and home consumption of livestock and livestock products for the calendar year 1949.
2/ Includes wheat, rye, rice, and buckwheat.
3/ Includes truck crops for market (artichokes, asparagus, lima beans, snap beans, beets, cabbage, cantaloupe, carrots, cauliflower, celery, cucumbers, eggplant, lettuce, onions, peas, peppers, spinach, tomatoes, and watermelons) and truck crops for processing (asparagus, lima beans, snap beans, beets, cabbage, sweet corn, cucumbers, peas, spinach, and tomatoes).
4/ Includes apples, peaches, pears, cherries, apricots, grapes, strawberries, cranberries, oranges, grapefruit, lemons, olives, dried California figs, fresh and dried plums, almonds, pecans, and walnuts.
5/ Includes dry edible beans, potatoes, and sweetpotatoes.
6/ Includes sugar beets, sugarcane for sugar, sugarcane sirup, sorgo sirup, maple sugar, and maple sirup.
7/ Includes peanuts in addition to the other crops.
8/ Includes cattle and calves, sheep and lambs, and hogs.
9/ Includes eggs, chickens, turkeys, and broilers.
10/ Includes wholesale milk, retail milk, butterfat, farm butter, and farm consumption of dairy products.

Table 2.- Total food utilization: Source and distribution, 1935-39 average and 1940 to 1949 1/

Year	Total food utilization	Source of total food: Food production	Imports	Reduction in stocks	Increase in stocks	Distribution: Civilian	Military, including military civilian feeding	Department of Agriculture 2/: Net purchases	Deliveries	Reduction in stocks	Increase in stocks	Commercial exports and shipments 3/
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent
Section a. Percentage of food utilization in each year												
1935-39 Av.	100.0	93.9	6.1			97.7		- .2		.2		2.5
1940	100.0	95.1	5.5		.6	98.0						2.0
1941	100.0	94.4	5.8		.2	93.3	2.0	2.4	1.9		.5	1.8
1942	100.0	94.2	3.7	2.1		87.2	5.8	5.9	4.5		1.4	1.1
1943	100.0	95.8	4.8		.6	81.4	9.6	8.1	7.1		1.0	.9
1944	100.0	94.0	5.0	1.0		79.7	13.2	6.0	6.5	.5		1.1
1945	100.0	95.7	4.8		.5	82.3	4/12.0	4.2	5.2	1.0		1.5
1946	100.0	96.1	4.3		.4	89.7	4/ 3.2	4.4	5.2	.3		2.7
1947	100.0	95.4	4.8		.2	89.7	4/ 3.3	2.9	2.8		.1	4.1
1948	100.0	94.8	5.0	.2		91.5	4/ 3.4	2.0	2.2	.2		3.1
1949 Prel.	100.0	95.1	4.6	.3		91.0	4/ 3.9	1.9	1.8		.1	3.2
Section b. Percentage of 1935-39 food utilization												
1935-39 Av.	100.0	93.9	6.1			97.7		- .2		.2		2.5
1940	109.6	104.2	6.0		.6	107.4						2.2
1941	114.4	108.0	6.7		.3	107.3	2.3	2.7	2.2		.5	2.1
1942	125.6	118.3	4.7	2.6		109.5	7.3	7.4	5.6		1.3	1.4
1943	131.3	125.8	6.3		.8	106.9	12.7	10.6	9.3		1.3	1.1
1944	139.9	131.5	7.0	1.4		111.4	18.4	8.5	9.1	.6		1.6
1945	136.4	130.5	6.6		.7	112.2	4/16.4	5.7	7.1	1.4		2.1
1946	136.7	131.5	5.8		.6	122.6	4/ 4.3	6.1	7.1	1.0		3.7
1947	137.7	131.4	6.6		.3	123.7	4/ 4.5	3.9	3.8		.1	5.6
1948	132.8	125.8	6.7	.3		121.6	4/ 4.5	2.6	2.9	.3		4.1
1949 Prel.	133.2	126.7	6.1	.4		121.2	4/ 5.2	2.5	2.4		.1	4.3

1/ The upper section of the table divides the total utilization in each year (1) according to the source of the food and (2) according to its distribution. Both the total utilization figure and the break-down are on an index-number basis; that is, they represent quantities weighted by average farm prices in the period 1935-39. The utilization figure includes both domestically produced and imported foods. The lower section contains the same data expressed as a percentage of total food utilization in 1935-39 instead of total utilization in each year. 2/ The quantities assigned to the Department of Agriculture are food for lend-lease, relief, and purchases for foreign governments, except for meat transactions in the drought years. These quantities are measured (1) in terms of Department of Agriculture purchases from commercial channels and (2) in terms of shipments out of the country. When measured in terms of purchases, additions to Department of Agriculture stocks are included. When measured in terms of shipments, additions to stocks are shown separately. When Department of Agriculture shipments were smaller than the total quantities purchased, stocks were built up; and vice versa. 3/ For the war years, these data indicate the commercial portion of exports and shipments, which is total exports and shipments minus the exports assignable to the Department of Agriculture.
4/ Including procurement for relief feeding in areas occupied by our armed forces.

A survey recently completed by the Bureau of Agricultural Economics indicates that the enrichment of cereal food products with synthetic vitamins and iron has been a significant factor in the increased supplies of niacin, thiamine, riboflavin and iron available for civilian consumption in recent years. Compulsory enrichment of white bread and flour was required by Government regulations in the period July 1, 1943 until October 24, 1946. Since the termination of the Federal enrichment program individual states have passed similar regulations. As of June 15, 1949, 25 states required the enrichment of white bread, rolls and flour. Available data indicate that about 65 percent of the white flour sold to civilians as flour or products was enriched during the period of compulsory enrichment (under the Federal program). A survey for the two full years that followed indicates that enrichment continued at about the same rate.

RETAIL FOOD PRICES

The BLS index of retail food prices in 56 cities in United States averaged 203 for the first 6 months of 1949 (1935-39=100), about 2 percent below the average for the same months of 1948. All food commodity groups other than fresh and canned fruits and vegetables, sugar and sweets, and beverages were lower than a year ago. Surveys by BAE indicate that retail prices of food bought by farmers averaged about 5 percent lower in the first half of 1949 than a year earlier. Retail food prices are expected to decline slowly during the last 4 months of the year when seasonally large supplies of meat and fruit become available.

Although general economic indicators have been pointing downward thus far in 1949, activity in important parts of the economy is holding up or increasing contrary to the overall trend. Construction expenditures and business financial outlays for plant and equipment were larger in the first half of 1949 than a year earlier. Consumer disposable income (in terms of annual rates) in the second quarter of 1949 was somewhat lower than in the preceding quarter, but remained above the second quarter of last year. For the first 6 months, consumer disposable income was slightly above the January-June 1948 level.

The demand for food in general during the first 6 months of 1949 appears to have continued strong. The seasonally adjusted index for daily average sales of retail food stores during the first 5 months this year was 0.5 percent higher than the average of 339.2 (1935-39=100) in the same months of 1948. These indexes are not adjusted for changes in retail food prices, which averaged 3.3 percent lower during the same months of this year as compared with a year earlier.

The export demand for U. S. foods during the latter half of the year is expected to continue strong, but may be at a level slightly lower than in the same period of 1948. Even though the shortage of dollars in many foreign countries will tend to limit food imports from the United States many food-deficit countries still need substantial food imports to maintain the diets of their people above minimum nutritional levels. The European Recovery Program and military programs for feeding of civilians in occupied areas are expected to continue as major factors in determining the extent of the foreign demand for United States farm products.

Table 3.--Apparent civilian consumption of major food commodities on a per capita basis, calendar years, 1935-39 average, 1945, 1946, 1947, 1948 and preliminary estimates for 1949 with percentage comparisons 1/
(Primary distribution weight)

Commodity	Average 1935-39	1945	1946	1947	1948	1949 Prel.	1949 as a percentage of 1935-39	1949 as a percentage of 1948
	Pounds	Pounds	Pounds	Pounds	Pounds	Pounds		
Meats (carcass weight) - Total	126.2	144.4	153.4	155.0	146.4	146.0	116	100
Beef	55.2	59.0	61.3	69.1	63.3	62.5	113	99
Veal	8.1	11.8	9.9	10.7	9.4	8.5	105	90
Lamb and mutton	6.3	7.3	6.6	5.4	5.0	4.0	59	80
Pork (excluding lard)	56.1	66.3	75.5	69.8	68.7	71.0	127	103
Fish (edible weight) - Total	11.1	10.6	11.0	10.3	11.0	2/	-	-
Fresh and frozen	5.3	7.1	6.2	6.2	6.5	2/	-	-
Canned 3/	4.8	2.6	3.8	3.8)	4.5	2/	-	-
Cured	1.0	.9	1.0	.8)				
Poultry products								
Eggs 4/	37.3	49.6	46.8	47.4	48.2	47.9	128	99
Chicken (dressed weight)	17.9	28.8	25.4	23.6	23.0	25.2	141	110
Turkey (dressed weight)	2.8	4.3	4.5	4.5	3.7	4.8	185	130
Dairy products								
Total milk (whole milk equivalent)	801	803	813	794	750	756	94	101
Cheese	5.5	6.6	6.6	6.9	6.8	7.2	131	106
Condensed and evaporated milk	16.7	18.2	18.5	20.4	20.6	20.9	125	101
Fluid milk and cream	340	432	423	398	387	370	109	96
Fats and oils - Total, fat content 5/	44.7	38.8	39.7	41.8	42.5	42.8	96	101
Butter, farm and factory (actual weight)	16.7	10.9	10.5	11.2	10.0	10.8	65	108
Lard	11.0	11.6	11.8	12.7	6/13.0	13.0	118	100
Margarine (actual weight)	2.9	4.0	3.8	5.0	6.1	5.7	197	93
Shortening	11.7	9.1	10.1	9.3	9.5	9.5	81	99
Other edible fats and oils	6.3	6.1	6.2	6.9	7.0	7.0	111	100
Fruits								
Fresh - total	137.7	144.7	140.9	145.5	133.8	132.0	96	99
Citrus	48.9	66.2	58.7	61.9	53.8	50.0	102	93
Apples (Commercial)	30.4	22.9	23.2	25.2	25.2	24.8	82	98
Other (excluding melons)	58.4	55.6	59.0	58.4	54.8	57.2	98	104
Processed								
Canned fruit	14.9	14.3	21.8	18.2	17.7	19.5	131	110
Canned juices	3.9	10.9	17.7	16.3	18.1	15.3	392	85
Frozen	.8	2.3	3.1	3.2	2.9	2.9	362	100
Dried	5.8	5.9	4.5	4.4	4.3	4	69	93
Vegetables								
Fresh	235	267	271	251	256	245	104	96
Canned	29.9	42.9	46.6	40.0	36.5	36.4	122	100
Frozen	7/ .4	1.9	2.0	2.6	3.0	2.9	725	97
Potatoes	131	126	127	123	108	110	84	102
Sweetpotatoes	21.4	18.8	17.8	15.8	14.0	14	65	100
Dry edible beans	8.8	7.7	8.7	8.5	7.7	8.4	95	109
Sugar, refined (Revised)	97.0	73.5	74.4	91.1	95.6	90.4	93	95
Grains								
Corn products:								
Corn meal	22.9	18.0	15.9	14.6	14.5	15	66	103
Corn sirup	7.6	11.9	11.8	12.8	8.2	9.5	125	116
Corn starch	1.3	1.9	1.8	1.9	1.7	1.7	131	100
Corn sugar	2.7	3.9	3.8	4.5	4.0	4.5	167	112
Breakfast cereals	1.6	2.2	2.0	1.7	1.7	1.7	106	100
Hominy	1.4	2.3	2.4	2.4	2.4	2.4	171	100
Oatmeal	3.9	3.6	3.7	3.5	3.4	3.5	90	103
Barley food products 8/	1.4	1.5	2.0	1.9	1.5	1.5	107	100
Wheat:								
Flour 9/	153	158	154	6/135	135	135	88	100
Breakfast cereals	3.7	3.7	3.5	3.5	3.5	3.5	95	100
Rye flour	2.2	2.6	1.9	1.7	1.6	1.6	73	100
Rice, milled	5.6	4.9	4.0	5.8	4.9	5.3	95	108
Beverages								
Coffee 10/	14.0	16.3	19.9	17.3	18.9	17.8	127	94
Tea	.67	.55	.52	.55	.55	.6	90	109
Cocoa beans	4.4	4.0	4.2	4.2	3.7	3.8	86	103
Peanuts (shelled)	4.4	6.4	5.0	4.7	4.3	4.3	98	100

Population estimates used to obtain per capita consumption figures are official Census estimates of total population adjusted for underenumeration of children under 5 and for military personnel not eating out of civilian supplies.
1/ Data on calendar year basis except for dried fruits which are on a pack year basis; fresh citrus fruits and peanuts on a crop year basis, rice on August 1 year. All years begin in year indicated except for fresh citrus, which begins in October of the previous year and rice which begins in August of previous year. 2/ Not available. 3/ Excludes canned food products containing small quantities of fish such as clam chowder, etc. 4/ In terms of number of eggs, the apparent per capita consumption was 298 in 1935-39, 397 in 1945, 374 in 1946, 379 in 1947, 386 in 1948 and 383 estimated for 1949. 5/ Computed from unrounded data. 6/ Revised. 7/ Average 1935-39. Data prior to 1937 are not available. 8/ All barley food products in terms of malt equivalent. 9/ Includes white, whole wheat, and Semolina flour. 10/ Green bean basis.

NUTRITIONAL REVIEW 1/

According to current estimates, the per capita supply of most major nutrients available for consumption in 1949 probably will be slightly lower than in 1948 and at about the same level as in the early 1940's. During the war years, per capita quantities of most nutrients, especially minerals and vitamins increased rapidly until they reached their peak levels in 1945 and 1946. The anticipated decline from the 1948 level is much less significant than the present continued downward trend.

The quantities of fat, iron and thiamine available for consumption remain about the same as last year as a prospective increase in the per capita supplies of fats and oils, meats, poultry and fish, dry edible beans, peas and nuts, tends to offset anticipated decreases in some of the other food groups.

The per capita quantity of protein available in 1949 is expected to be about 3 percent below that for 1948, and the lowest since 1946. The amount of calcium available per person in 1949 may reach the lowest point since 1942; both calcium and riboflavin are likely to be more than 10 percent below the peak level reached in 1946.

Table 4.- Nutrients available for civilian consumption per capita per day, calendar years, 1935-39 average, 1945 to 1948 and preliminary estimates for 1949, with percentage comparisons 1/

Nutrients	Units	Average 1935-39	1945	1946	1947	1948	1949 Prel.	1949 as a percentage of 1935-39	1949 as a percentage of 1948
Food energy	Cal.	3,240	3,330	3,380	3,350	3,240	3,210	99	99
Protein	Grams	89	103	105	98	96	93	104	97
Fat	Grams	131	140	146	144	141	142	108	101
Carbohydrate	Grams	429	422	417	420	404	395	92	98
Calcium	Grams	.92	1.11	1.14	1.08	1.04	1.03	112	99
Iron	Mg.	14.0	18.8	19.1	18.1	17.0	17.0	121	100
Vitamin A value	I.U.	8,100	9,800	9,500	8,800	8,700	8,600	106	99
Thiamine	Mg.	1.55	2.24	2.35	2.13	2.05	2.03	131	99
Riboflavin	Mg.	1.88	2.58	2.61	2.46	2.35	2.33	124	99
Niacin	Mg.	15.5	21.8	21.9	20.7	19.5	19.5	126	100
Ascorbic acid	Mg.	114	139	137	130	123	120	105	98

1/ Data computed by the Bureau of Human Nutrition and Home Economics on the basis of estimates of apparent civilian consumption (retail basis) including estimates of consumption from urban gardens, supplied by the Bureau of Agricultural Economics. No deductions have been made in the nutrient estimates for the loss or waste in the home or for the destruction or loss of nutrients during the preparation of food. Deductions have been made for inedible refuse. The data for 1945-49 for iron, thiamine, riboflavin, and niacin include the amounts of these nutrients added to prepared cereals, bread and white flour under the enrichment program. (See special article, "Cereal Food Enrichment in the United States, 1946-48" beginning page 17.)

1/ Prepared in cooperation with the Bureau of Human Nutrition and Home Economics.

COMMODITY REVIEWS

Meats

Meat supplies during the remainder of 1949 are expected to be somewhat greater than a year earlier. Production in late summer is likely to be maintained at a slightly higher level than in the comparable part of 1948 by a continued large slaughter of grain-fed cattle, and by somewhat earlier marketings than last year of hogs from the 1949 spring pig crop.

Meat production during the fourth quarter will be greater than last year principally because of an increase in the number of hogs slaughtered. However, average hog weights are likely to be a few pounds lower than in 1948, and the increase in pork produced may be somewhat less than the increase in numbers slaughtered. Total production of meats other than pork may be slightly lower this fall than last, the greatest relative reductions being in veal and lamb. Total production of beef may be slightly less than in 1948. Output of the better grades of beef will be higher and the lower grades less than last year.

Production of veal, lamb and mutton thus far in 1949 has been smaller than last year, and probably will continue below the 1948 rate. The reduction in the output of lamb and mutton is a continuation of the downward trend of the past several years, and the 1949 consumption per person is expected to be the lowest on record.

Civilian per capita meat consumption in the United States during the third quarter of 1949 may be down slightly from the rate of a year earlier. In the fourth quarter, however, per capita consumption may be at least a pound greater than in the same months of 1948. This increase will at least partly offset the decreases from a year earlier that occurred in the first 9 months. As a result, the per capita consumption rate in 1949 will not be much different than the 146 pounds consumed per person last year.

Meat imports in 1949 probably will be considerably smaller than the 350 million pounds (carcass equivalent) imported last year. Much of last year's total was received from Canada after that country lifted its export restrictions on cattle and meat. Although total imports last year were equivalent to only 1 1/2 percent of domestic production during the same period, they added more than 2 pounds per person to the meat supply.

Retail meat prices are expected to decline seasonally during the fall months, but not as sharply as in the same months last year. The reduction is likely to be most marked in pork prices. Retail meat prices were comparatively steady during the spring and early summer, according to reports of the Bureau of Labor Statistics. Last year during that period they advanced sharply and then fell rapidly in a decline that began in August and ended in February of this year.

In the past year or two, the supply of beef, lamb and mutton has been somewhat limited by previous declines in cattle and sheep numbers. Slaughter of breeding stock this year has been down from the previous year. One-fifth fewer cows were slaughtered under Federal inspection during January-May 1949 than a year earlier, and one-fourth fewer than in 1947. This reduction indicates that cattle breeding herds are being maintained or possibly increased.

About 32 percent fewer mature sheep, mostly ewes, were slaughtered under Federal inspection the first 5 months of this year than a year previously. This, plus an 18 percent reduction in the slaughter of lambs and yearlings are evidence that sheep herds will be reduced less this year than in 1948.

Fish 1/

The per capita consumption rate of fishery products by United States civilians in the next few months is expected to be approximately the same as in the comparable period of 1948. Production of fishery products during the summer months may be somewhat below that of a year earlier principally because of the recent decline in the catch of croakers and other in-shore species for fresh consumption and a prospective reduction in the landings of fish for canning. The reported total catch of red salmon in Alaska through July 23, 1949 was almost 50 percent below that a year earlier. The impact of the small decline in fish for canning, however, should not be reflected in the consumer markets until late in 1949. Retail prices of fresh and frozen fishery products are likely to continue at a lower level than a year earlier but above those in the late spring of 1949.

Apparent civilian per capita consumption of fresh and frozen fishery products during the first half of 1949 was not much different from that in the same period last year. The market demand for canned fish was somewhat lower than in the first 6 months of 1948, and stocks at the primary distribution level at the end of the pack year (i.e., June 30, 1949) are estimated as being much larger than carryover stocks have been in recent years. According to the data collected by the Bureau of Labor Statistics, the retail price index of fresh and frozen fish in 56 cities during the first 6 months of 1949 averaged about 2 percent below that for the same months in 1948. On the other hand, although a decline was reported in every month in 1949 through June, the retail price of canned pink salmon averaged about 61 cents per pound, 16 percent above the corresponding 6 months average last year.

July 1 cold storage stocks of frozen fishery products for human consumption totaled 106.6 million pounds, 11 percent above that reported on the same date a year earlier. Most of the increase is due to larger holdings of salt water fish. During the next few months, with production at the seasonal high point, cold storage stocks of frozen fishery products will be expanded so that sufficient supplies will be available for distribution during the low production period in late 1949 and early 1950.

Imports of fresh and frozen groundfish (cod, haddock, hake, pollock and cusk) and rosefish fillets during the first 6 months of 1949 were somewhat less than the total for the same months of last year. However, increased imports are reported for the first 4 months of this year as compared to the corresponding period of 1948 for fresh water fish from Canada; frozen swordfish, and shrimp; canned tuna and bonito.

Exports of edible fish and fishery products during the first 5 months of this year were only about 12 percent below the total in the same period of 1948. Current trends indicate that exports in the remainder of 1949 probably will not exceed last year's level. The international balance of trade and the monetary position of some of the western European countries

1/ Prepared in cooperation with the Fish and Wildlife Service of the Department of the Interior.

thus far in 1949, in addition to ample supplies of fresh and frozen fish, have tended to restrict canned fish purchases from the United States. At least in the near future, foreign expenditures in this country are likely to be further restricted to essential food and industrial machinery and equipment. The United Kingdom has recently completed a purchase program for canned pilchards. The proposed purchase of canned salmon by the United Kingdom may be adversely affected by recent actions taken by the British to limit dollar expenditures.

Poultry and eggs

Supplies of eggs, chicken and turkey during the remainder of the year will be ample. Flocks this fall will be larger than a year earlier, reflecting the large spring hatch of both chicks and poults. With the large feed supplies indicated by present stocks and by prospective harvests, production and marketings of eggs, chickens and turkeys from July to December are likely to be greater than in the same period of 1948.

United States civilian per capita consumption of eggs in 1949 probably will be about the same as a year earlier. In the first half of this year farm egg production was about the same as in the comparable months of 1948; civilian consumption was close to the 1948 level in the same period. Compared with 1948, larger offerings of dried eggs to the Government's price support program plus an increased use of eggs for hatching just about offset the reduced flow of shell and frozen eggs into cold storage. Occasionally this year the spreads between the Government purchase price and wholesale prices in commercial channels were wider than in the first 6 months of 1948. This would seemingly favor an increased flow of eggs into direct consumption channels, but this was not the case.

July 1, 1949 total commercial cold storage holdings of shell and frozen eggs were 44 percent below those on the same date last year. Most stored shell eggs usually move out of cold storage into consumption channels in the months August through November. During this period of 1948, about 250 million dozen eggs (shell equivalent) moved out of cold storage. If only half this amount comes out of storage in the same period of 1949, farm egg production in these months as compared with last year would have to increase by 10 percent to make up the difference. (This overlooks the fact that fresh and stored or frozen eggs are imperfect substitutes for each other). It is very unlikely that production will increase to this extent with the period indicated.

Retail prices of eggs are expected to rise seasonally during the next few months, moving toward the peak which generally is reached in the last quarter of the year.

Present poultry meat supplies are larger than a year ago, and probably will continue above the 1948 level. U. S civilian per capita consumption of poultry meat in 1949 will be above last year's rates, with the largest percentage increase occurring in turkey consumption.

Chicken meat supplies during the remainder of 1949 will be considerably above a year ago because of expected increased sales of both commercial broilers, and mature and young birds from farm flocks. The current egg-laying flock is one percent smaller than last year. However, this deficiency is offset by the larger proportion of hens -- which are not normally kept for a third egg laying year -- and by the increased availability of pullets as

replacements for these hens. Young farm chickens, farm sales of which reach a peak in early summer, are in larger supply this year than in 1948. On July 1, 1949 the number of young chickens on farms was about 12 percent greater than the number of farms a year earlier. More commercial broilers are available this year than last because of the larger number (32 percent more) of broiler chicks placed during the second quarter than in the same period of 1948. Broiler supplies from chick placements since April are so large that they will be above the comparable 1948 level in the last half of 1949.

Turkey supplies this fall and winter will be much larger than in the same period of 1948. While no complete reports on the size of the 1949 turkey crop are yet available, sample reports of hatchery activity indicate that the number of turkeys hatched this year may be 60 percent above last year's level. For 1949 as a whole, per capita supplies of turkey are expected to be near or above the records of 4.5 pounds (dressed weight) per capita reached in 1946 and 1947.

Retail prices of chicken and turkey are expected to be lower during the remainder of 1949 than they were in the comparable months of 1948.

Dairy Products

Per capita consumption of dairy products by United States civilians during the latter half of the year is expected to be somewhat higher than in the same months of 1948. Increases are likely in butter, cheese and evaporated milk. Ice cream consumption per capita may be smaller than in the last half of 1948. The quantity of fluid milk and cream the average consumer will take will be influenced by the prevailing level of consumer disposable income.

Farm milk production in 1949 may be from 1 to 2 percent above the 115.5 billion pounds output last year. Milk production per cow has been establishing new high levels in every month since last fall, but dairy cows are somewhat less in number than a year earlier. This has occurred as a result of heavier feeding of concentrates plus the fact that farmers have milked a larger proportion of their cows than last year.

The increase in farm milk production during the first 5 months of 1949 as compared to last year was channeled into manufactured dairy products. The quantity of milk used in the production of butter and cheese together was 20 percent higher; this was offset by a 12 percent decline in total milk utilization for other manufactured whole milk dairy products. During the first half of 194 per capita consumption of fluid milk and cream appeared to be about the same as a year earlier. Compared with the earlier months of 1949, the utilization of milk in recent months has changed somewhat, with less going into butter, cheese and ice cream, and more being manufactured into evaporated milk.

Retail prices of manufactured dairy products in urban areas averaged slightly lower during the first 6 months of this year than last, according to reports of the Bureau of Labor Statistics. The consumer price of fluid milk sold in food stores in mid-June was 19.3 cents per quart, 5 percent below the level of a year earlier. For manufactured dairy products the price decline was sharper. Butter, at 70.3 cents per pound in June, was 2.3 percent under the reported June 1948 price. Cheese was down 11 percent, and evaporated milk 14 percent.

The retail price of fluid milk in the remainder of 1949 is not expected to change greatly from present levels. For manufactured dairy products, prices are likely to be slightly above current rates. Through July 22 the U. S. Department of Agriculture had purchased about 10 million pounds of butter and 267 million pounds of nonfat dry milk solids (dry skim milk), including procurement for export.

Exports of dairy products (measured on a fluid milk equivalent basis) from the United States have been small relative to total supply even in the war period when record high quantities moved out of the country. Nevertheless, for some items, changes in export prospects have significant short-run effects on the domestic market. Total exports of cheese from the United States in 1948 were 97 million pounds, about three-fourths to Great Britain. Exports of other dairy products started this year at a higher level than in 1948, but have since declined. Exports of cheese in 1949 may be little different from 1948 but out-shipments of most other items will be smaller.

Fats and Oils

United States civilian per capita consumption of fats and oils in 1949 is likely to average slightly higher than the 42.5 pounds (fat content) consumed a year earlier. Most of the increase will occur in butter. Margarine consumption is expected to be slightly lower than the record of 6.1 pounds per capita reached in 1948. No substantial change from last year's consumption rate is anticipated for the other fats and oils. Supplies of fats and oils for consumption in the latter half of 1949 probably will be larger than those a year earlier.

Lard output this summer is running moderately larger than a year ago, and in the latter half of 1949 will be substantially larger than the 1.2 billion pounds produced a year earlier. Production this fall probably will show a large increase over the fall of 1948, reflecting the 15 percent increase in the spring pig crop of 1949 compared with that of 1948. Factory and warehouse stocks of lard on June 1, the latest reported, totaled 175 million pounds, 29 million pounds less than a year earlier. This decline is small, however, in comparison with the probable increase in output.

Output of creamery butter in the first half of 1949 was about 19 percent larger than a year earlier. This margin of increase in output may not be maintained through the rest of 1949; in early July the comparable margin of increase was only 9 percent. Cold-storage stocks on July 1, 101 million pounds, were 48 million pounds above July 1, 1948.

Supplies of the major vegetable oils in food products may be roughly the same in the latter half of 1949 as a year earlier. This will depend partly on the yield per acre of cottonseed and soybeans to be harvested from 1949 crops. Acreage of cotton in cultivation July 1, 1949 was 14 percent larger than a year earlier, but the yield of cottonseed per acre was exceptionally high last year. The July 1 indicated acreage of soybeans to be harvested for beans in 1949 is 6 percent less than last year. The per acre yield of soybeans last year also was exceptionally high. On the basis of acreage estimates and average yields per acre, some reduction in output of vegetable oils next fall is indicated. Offsetting this, however, are larger stocks of edible vegetable oils this year than last. Factory and warehouse stocks of corn, cottonseed, peanuts, and soybean oils on June 1 this year totaled 559 million pounds compared with 390 million pounds a year earlier.

Total exports (including shipments to U. S. territories) of lard, soybean oil, cottonseed oil, and soybeans (in terms of oil) in the first 5 months of 1949 totaled 699 million pounds. This was 448 million pounds more than a year earlier and was at an annual rate well above total exports of these items in any previous year. Exports were especially large in March, April, and May, partly as a result of the termination of export controls in early February. The most urgent demands in many countries probably were met by these exports, and inventories in at least some countries restored to adequate working levels. Exports in April and May also included substantial quantities that had been authorized some time earlier for shipment to ECA countries. ECA authorizations have been small since March, and this is likely to be reflected in a decline in the level of exports this summer, compared with earlier in the year.

Retail prices of food fats and oils have been declining reflecting the substantial decline in wholesale prices of fats and oils. In June the retail price of butter in leading cities of the United States averaged 70.3 cents per pound compared with 91 cents a year earlier, a reduction of 22 percent. Retail prices of lard, margarine, and shortening averaged about 30 percent lower than a year earlier.

Table 5.- Retail price per pound of food fats and oils, leading cities of the United States, and wholesale price per pound of certain edible fats and oils, specified markets, May 1949 with comparisons

Item	June 1948	1949		June 1949 as percent of	
		January	June	June 1948	January 1949
	Cents	Cents	Cents		
RETAIL PRICE					
Butter	91.0	75.0	70.3	77	94
Lard	29.6	24.3	18.1	61	74
Margarine	44.1	36.3	29.0	66	80
Shortening	45.2	40.9	34.3	76	84
WHOLESALE PRICE					
Butter, 92-score, Chicago	80.9	63.2	58.8	73	93
Lard, tank car lots, Chicago	20.5	13.5	10.8	53	80
Cottonseed oil, crude, tanks S. E. mills	35.4	15.0	10.0	28	67
Soybean oil, crude, tank car, Midwest mills	27.3	14.3	9.4	34	66

Retail prices from Bureau of Labor Statistics; wholesale prices compiled from Trade Journals.

Butter consumption apparently has repsonded to the reduction in price. Disappearance of creamery butter from factories and cold-storage warehouses, minus net exports, in January-May 1949 totaled 556 million pounds, 16 percent more than a year earlier. Civilian disappearance in 1949 may be almost 11 pounds (actual weight) per person compared with 10.0 pounds in 1948.

Consumption of margarine in the United States in January-May 1949, as measured by tax paid withdrawals, was 360 million pounds, 9 percent less than a year earlier. In most years of a substantial decline in butter prices, margarine consumption has also decreased. Consumption in 1949, however, is likely to be only moderately less than the 1948 peak of 6.1 pounds (product weight) per person, since the difference between prices of butter and margarine is unusually wide this year.

Domestic disappearance of the food fats and oils other than butter and margarine in 1949 is expected to be at last year's rate of 29.5 pounds per person.

Fruit

Supplies of most fresh fruits will be considerably larger this summer and fall than during the same time last year and moderately larger than usual. The principal exception is citrus, which will continue short until the new crop gains volume next fall. Supplies of most processed fruits probably will be sufficient to meet domestic demand at present prices, but those of canned citrus juices will remain smaller this summer than last.

Retail prices for most of the fresh fruits from the large 1949 deciduous crops are expected to decline more than seasonally this summer, and by fall should be lower than a year earlier. However, for both fresh and canned citrus, prices will continue substantially higher this summer than last. Not much change in the prices of processed fruits other than citrus products is in prospect for the summer.

The deciduous fruit crop will be large this year, assuring larger-than-usual supplies of nearly all major fruits. Total production of 8 major deciduous fruits -- apples, apricots, cherries, peaches, pears, plums, prunes, and grapes -- is estimated to be about one-eighth larger than that of 1948 and nearly one-tenth larger than the average for 1938-47. The apricot crop is about one-eighth smaller than last year but still near average. Although one-fourth smaller than the record crop last year, the sour cherry crop is still one-sixth larger than average.

The 1949 crops of almonds, walnuts and filberts are expected to be record large. As usual, domestic production will be supplemented by imports of such nuts as Brazil nuts and cashews which are not grown in the United States.

Supplies of fresh citrus fruits, coming mostly from California, will continue short this summer, mainly because of freeze damage to the crops last winter. Supplies of lemons early in July were only about half those a year earlier, and by the end of summer probably will be very short. The reduced domestic supplies have been supplemented by increased imports from Italy. Through early July this year, such imports were nearly double comparable imports in the preceding season but only about 2 percent of the 1948-49 U. S. production. Retail prices of lemons continue much higher than last summer. Supplies of fresh oranges and grapefruit will be moderately smaller than last summer, and prices will continue higher.

Bananas continue to be imported at about the same rate this year as last. They provide a per capita consumption of about 20 pounds per year. This compares with a rate of consumption of about 40 pounds for fresh oranges and 25 pounds for fresh apples.

The large 1949 crops of deciduous fruits will provide ample supplies for canning and other types of processing. Another large pack of canned fruits seems likely. Increases in production seem probably for canned pears and apples, and a decrease for canned sour cherries.

At the beginning of the 1949-50 production season packer stocks were larger, but distributor stocks were smaller, than a year earlier, reflecting cautious buying policies on the part of distributors. On June 1, packer stocks of canned apples, applesauce, apricots, sweet cherries, fruit cocktail, peaches, pears and pineapple combined were about 40 percent larger than on the same date in 1948. On the other hand, wholesale distributor stocks of apricots, peaches, pears, pineapple, and fruit cocktail combined were about 19 percent smaller on June 1 than comparable stocks a year earlier.

Supplies of canned fruit juices, mostly citrus, are smaller this summer than last. This is partly the result of the freeze damage last winter which reduced supplies of citrus fruit for canning. Even at the higher retail prices for canned citrus juices this spring than last, this product has moved readily into consumption channels. On June 1, packer stocks of canned citrus juices were about 58 percent smaller, and wholesale distributor stocks about 24 percent smaller than a year earlier.

Stocks of frozen fruits, fruit juices, and berries in cold storage July 1, 1949 totaled 256 million pounds, about 8 percent smaller than stocks on July 1, 1948. The largest holdings on July 1, 1949 consisted of strawberries and frozen fruit juices and purees. Reductions from a year ago were largest for strawberries, apples, and peaches. But holdings of frozen fruit juices were more than twice as large as a year earlier. The larger cold-storage stocks of citrus juices will to some extent offset reduced supplies of the canned citrus juices. Per capita consumption of frozen fruits, juices and berries in total probably will continue at the current annual rate of about 3 pounds.

Dried fruits continue in ample supply. Although the 1949-50 pack of dried prunes is expected to be about 5 percent smaller than the 1943-49 pack, the total pack of dried fruit probably will be as large and even may exceed that of a year earlier.

Vegetables

Prospective supplies of all vegetables for fresh market this summer appear almost as large as those produced in the summer of 1948. However, there will be wide differences for certain crops. Larger summer supplies than last year are expected for watermelons, lettuce and early summer onions, while for green peas, honey dew melons, eggplant, carrots, celery and green peppers the prospects are considerably less favorable. Current indications for the fall crop point to a slightly smaller acreage of cabbage and a considerably smaller acreage of early fall season tomatoes than a year earlier. For the year as a whole, United States civilian per capita consumption of fresh vegetables is expected to be somewhat below the 1948 rate. Retail and wholesale prices thus far in 1949 have, as usual, reflected inversely any change in seasonal supplies. A sharp seasonal drop in the general level of truck crop prices this summer was checked by the development of drought conditions in the Northeastern States.

During the first half of the year, production of vegetables for fresh use is estimated to have been about 5 percent smaller than in the same period of 1948. However, with larger carry-over stocks of cabbage, carrots and onions on January 1 compared to a year earlier, civilian per capita consumption was maintained at about the same level as in the first 6 months of 1948. Although there was considerable variation from month to month, retail prices prevailing in 56 large cities for the fresh vegetables reported by the Bureau of Labor Statistics averaged generally lower through June this year than in the corresponding months of 1948 for green beans, cabbage, carrots, and onions, but higher for lettuce and spinach.

Canned and frozen vegetable supplies continue large. Total packer and wholesale distributor stocks of canned snap beans, corn, peas, whole tomatoes and tomato juice were between 5 and 10 percent higher on June 1, 1949 than a year earlier. Much larger holdings of canned sweet corn and slightly larger holdings of tomatoes more than offset the decline in stocks of green peas and snap beans. July 1 cold-storage holdings of frozen vegetables were about 12 percent greater than on the same date in 1948. Holdings of frozen asparagus, sweet corn, Brussels sprouts, and pumpkin and squash were lower than last year.

In total, large commercial packs of both canned and frozen vegetables are in prospect for this year. Smaller production than in 1948 appears likely only for sweet corn and whole tomatoes. Retail prices of canned and frozen vegetables have remained generally stable thus far in 1949. No sharp change from current levels is expected in the near future.

Supplies of potatoes during the last half of 1949 are expected to be much smaller than a year earlier. The prospective crop in the intermediate and late season producing areas this year is estimated at 307.5 million bushels, about 73 million bushels (or nearly 20 percent) below production in the same areas last year.

United States civilian per capita consumption of potatoes for the year as a whole is expected to be about as large as in 1948. The decline in production this year compared to last will be reflected mainly in reductions in Government purchases of potatoes under the support price program.

Retail prices of potatoes in the next few months may decline somewhat from present levels and then rise during the closing months of the year. During the first half of the year retail prices of potatoes averaged slightly lower than in the same period of 1948 but were still relatively high.

Exports of potatoes in 1949 will be low relative to those in recent years. The need for potatoes abroad — both for food use and for seed — has declined materially because of favorable crops and the general improvement in food production in western European countries.

Sweetpotato production in 1949 is expected to be 4 percent greater than a year ago, and if present crop prospects materialize, lower retail prices are expected this fall than a year earlier. With larger supplies and lower retail prices, United States civilian per capita consumption of sweetpotatoes in 1949 is likely to be larger than a year earlier.

Somewhat smaller crops of dry edible beans and dry field peas are in prospect this year compared to 1948. With ample supplies being carried over from last year's crop in both Government and commercial storage, sufficient supplies will be available to meet the expected domestic and foreign needs. Per capita civilian consumption of these products in 1949 is expected to be somewhat higher than last year, but prospects for exports are less favorable.

Grains

United States civilian per capita consumption of cereal food products in 1949 is not likely to be much different from that in 1948. The consumption rate for wheat products in general during the past few years has tended to resume the general downward trend evident in the prewar period. However, little change from the 1948 rate of 135 pounds of flour per capita is expected in consumption in the current year. Although supplies of oats and rice are above a year ago, and those of rye and barley lower, the per person consumption rate is expected to continue at about the same level as in 1948. Consumption of corn products may be slightly higher in 1949 than a year earlier primarily because of the anticipated increased civilian use of corn starch, sirup and sugar. Retail prices of cereal food products are expected to continue at about current levels; the price of rice probably will decline somewhat following the 1949 crop harvest in August

Prospective wheat supplies in the United States during 1949-50 are currently estimated at 1,482 million bushels. With a 100-million bushel larger old-crop carryover on July 1, 1949 than a year earlier offsetting a comparable decline in the size of the 1949 crop, compared to 1948 output, total supplies will be about the same as the 1,484 million bushels in 1948. Estimated domestic disappearance of 700 million bushels, which includes 480 million bushels for civilian food use, is expected to leave approximately 780 million bushels for export and carryover on July 1, 1950. If exports total 450 million bushels, the carryover, would be about 330 million bushels, slightly higher than that of July 1, 1949.

With a very large decline in the 1949 wheat crop prospects that occurred during the month of June, the total wheat supply forecast for 1950-51 is less than the level at which a wheat marketing quota is required. However, the projected supplies for next year are sufficiently large for acreage allotments to be established for the 1950 crop. On July 14, an allotment of 68.9 million acres was announced by the Secretary of Agriculture Such an acreage would be larger than in 18 of the 24 years between 1920 and 1945, and with average yields would provide sufficient wheat for anticipated domestic and foreign needs and for carryover stocks.

Rye supplies for 1949-50 are currently indicated at 31 million bushels, which are under the 36 million of the preceding year. The 1949 crop is expected to provide 20 million bushels, and imports 3 million bushels; old-crop carryover stocks on July 1 were 8 million. The reduction in supplies from the 1948-49 level will not reduce the quantity available for domestic food use (about 5.5 million bushels) in the current year. With no sharp change from the 1948-49 level anticipated in the domestic nonfood use of rye during the current fiscal year, and with exports of possibly 5 million bushels, carryover stocks on July 1, 1950 probably will be somewhat lower than those on July 1, 1949.

In 1948-49 total rye supplies were 36.3 million bushels. This supply was distributed as follows: food use, 5.5 million bushels; feed and seed, 10.2 million; alcohol and spirits, 6.9 million; exports, 5.4 million; carryover stocks, 8.3 million bushels.

The 1949 rice crop, now estimated at 86 million bushels, sets a new record in size. The current indication is 6 percent above the 1948 crop and 37 percent above the average 1938-47 production of 62.9 million bushels. Civilian food use of rice in the United States during 1949-50 may be slightly higher than the 5.0 pounds (milled basis) per capita of 1948-49 but still somewhat below the average 5.6 pounds consumed in the prewar 1935-39 period. Exports from the United States during 1949-50 are expected to continue large. The retail price of rice may decline somewhat from present levels after the 1949 crop is harvested.

Prospective supplies of corn, oats and barley will be sufficient to meet currently anticipated domestic and foreign needs in 1949. With a near-record corn crop of 3.5 billion bushels indicated for this year, supplies during the 1949-50 marketing year probably will reach an all-time record of about 4.3 billion bushels, 15 percent above that in the preceding marketing year. Farmers placed about 533 million bushels of 1948-crop corn under the Government support program, a considerably portion of which is expected to remain under support program into the 1949-50 season. Farm sales of corn in 1949-50 are expected to be fully adequate for industrial and food needs, which are expected to continue close to the 1948-49 level. The big 1949 corn crop is expected to be more than sufficient for all domestic and export requirements in 1949 and will provide for a further increase in stocks of corn.

During the first half of 1949 consumption of corn products as food has been slightly larger than a year earlier. Retail prices for these products through June of this year have been fairly stable and much lower than in the same period of 1948. The retail price of corn meal declined 10 percent in the last half of 1948; the corn flakes price remained about the same. For the remainder of 1949 corn food products prices are expected to remain fairly close to present levels; any decline as a result of the harvesting of this year's large crop is expected to be much less than occurred last year.

Supplies of oats in 1949 will again be ample for domestic food uses, with the retail price of the major food products remaining at about present levels at least in the next few months. The supply of oats in prospect for 1949-50, estimated about 1,675 million bushels, is close to the level of the preceding year, and about 28 percent above the 1937-41 average. As of July 1, the 1949 oat crop was estimated at 1,380 million bushels, approximately 8 percent under the large output in 1948. Imports of oats probably will be considerably smaller this year than in 1948-49; exports will be down somewhat.

Barley supplies will be sufficient for domestic needs in 1949. Neither the per capita barley products consumption by United States civilians nor retail prices are expected to change greatly. A year ago, prices declined sharply after the 1948 crop was harvested.

The 1949 barley crop was estimated in July at 244 million bushels, the smallest crop in recent years and a little below the 1937-41 average. With the old-crop carryover on July 1 of 100 million bushels, the largest since 1943, the 1949-50 supply totals about 344 million bushels. This is 10 percent below the 1948-49 supply, but slightly above the prewar average.

Sugar

Sugar deliveries by primary distributors for domestic consumption have been somewhat higher thus far in 1949 than a year earlier. Through June the distribution totaled 3,598 thousand tons (raw sugar basis) as compared to 3,259 thousand tons in the first 6 months of 1948. Domestic sugar prices have been higher in 1949 than in 1948.

The July 1 crop report indicates that production of sugar from this season's continental United States cane and beet sugar crops will be higher than last season's. The prospective 1949 sugar cane crop of 8,032 thousand tons for sugar and seed use is 17 percent above last year's output and 35 percent above the 1938-47 average. Sugar production from this year's cane crop may approximate the 1938 record of 583 thousand tons (raw sugar basis).

The 1949 crop of sugar beets is currently estimated at 9,505 thousand tons, 2 percent above the output of last year but more than 5 percent below the 1938-47 average. Sugar production from this year's crop of sugar beets is expected to equal the 1948 production of 1,369 thousand tons (raw sugar basis).

The production of sugar in areas which generally supply the continental United States is high. The sugar cane grinding season has been completed in Cuba, and in the Philippines, and is nearing completion in Puerto Rico. The preliminary production figures, in thousand short tons (raw sugar basis), are as follows: Cuba, 5,763; Puerto Rico, 1,275; and the Philippines, 800. Production in Cuba was 14 percent below the 1948 record crop. In Puerto Rico the sugar output in 1949 was 15 percent above 1948 and set a new record, while that in the Philippines, although 60 percent higher than the 1948 production, was still about 30 percent below the 1935-39 average.

Cereal Food Enrichment in the United States, 1946-48 1/

The enrichment of cereal food products with snythetic vitamins and iron has been a significant factor in the increased supplies of niacin, thiamine, riboflavin and iron available for civilian consumption in recent years. Between 10 and 20 percent of the per capita supplies of these nutrients came from the enrichment of cereal products in 1948. The enrichment of all white bread and rolls was required under War Food Order No. 1 from January 1943 until October 24, 1946. In addition, a substantial proportion of white flour sold for home use was enriched voluntarily. On the basis of trade and Government data it was estimated that about 65 percent of the white flour sold to civilians as flour or in products was enriched during the period of the compulsory program.

1/ Prepared under Research and Marketing Act project, "Improvements in Food Consumption Data and Analysis".

Little information was available as to the extent of enrichment, after the termination of the compulsory enrichment program. Such information is necessary for the calculation of the nutritive value of the per capita food supply. Therefore, the Bureau of Agricultural Economics, with the assistance of the Bureau of Human Nutrition and Home Economics, planned a survey, and late in 1948 the Bureau of the Census collected the information from 17 firms manufacturing and/or selling enrichment premixes and wafers (used for bread enrichment). These firms probably account for more than 95 percent of the ingredients used for such purposes. They included two large flour millers who prepare their own enrichment mixes, manufacturers of enrichment premixes for flour, manufacturers of enrichment premixes for sale to bakeries and restaurants (other than wafers) and the firms selling enrichment wafers directly to bakeries and restaurants, mostly yeast companies.

The results of the survey are given in table 6. The data for 1946 and 1947 are the quantities actually used or sold by these firms whereas those for 1948 are preliminary estimates submitted before the end of the year. The firms supplied data on the quantities used in premixes for flour, for bread and for other cereal products. Because of the regulations of the Bureau of the Census concerning release of confidential information supplied by individual firms, the only indication of the extent of the enrichment of cereal food products, other than bread and flour, is that 129 kilograms of riboflavin were so used in 1946, 403 kilograms in 1947 and perhaps 666 kilograms in 1948. Therefore, the quantities used in enriching cereal products other than bread and flour have been combined in the table with those used in premixes other than wafers for bread. However, the changes in the use of enrichment ingredients in the various products are indicated by the indexes given in the lower part of the table.

These synthetic vitamins and iron were used in enriching flour for export and for military use as well as for cereal products for domestic civilian consumption. Although information on the extent of enriched flour exported through commercial channels is not available, perhaps as much as 15 to 20 percent of such flour is enriched. Practically all of the flour bought by the armed forces and by the Department of Agriculture for export has been enriched in recent years. After taking into account the quantities of enrichment ingredients necessary for such enrichment of flour for noncivilian use, it appears that the residual supplies of synthetic vitamins and iron reported as used and/or sold in 1946-48 were sufficient to enrich about 65 percent of all white flour sold for civilian use in those years, either at the mill level or in bakeries. This equals the rate of enrichment under the Federal enrichment program during 1943-46. As of June 15, 1949, 25 states required the enrichment of white bread, rolls and flour.

Table 6.- Use of synthetic vitamins and iron in the enrichment of cereal products, United States, 1946-48 1/

Use and kind	Unit	Enrichment ingredients used in 1946	1947	1948 (prel.)
1. Use in preparing mixes for commercial or family flour or bread and contained in pre-mixes for use in cereal food products other than bread and flour:				
Niacin	kilograms	117,586	148,208	138,079
Thiamine	kilograms	16,827	21,407	20,074
Riboflavin	kilograms	10,199	12,304	11,701
Iron	kilograms	106,748	129,935	122,898
2. Enrichment wafers sold direct to bakeries and restaurants:				
Hgih potency riboflavin	No. of wafers	26,866,677	26,153,518	24,931,358
Low potency riboflavin	No. of wafers	35,003,225	36,330,994	35,960,450
Total	No. of wafers	61,869,902	62,484,512	60,891,808
3. Total use of enrichment ingredients in bread and flour and cereal products civilian and noncivilian:				
Niacin	kilograms	191,830	223,189	211,149
Thiamine	kilograms	28,582	33,279	31,643
Riboflavin	kilograms	15,067	17,201	16,462
Iron	kilograms	162,431	186,171	177,701
4. Use in preparing mixes for commercial or family flour or bread in 1947 and 1948 as percentage of 1946:				
Niacin	1946=100	100	125	115
Thiamine	1946=100	100	126	116
Riboflavin	1946=100	100	118	110
Iron	1946=100	100	121	113
5. Content of pre-mixes for use in cereal food products other than bread and flour in 1947 and 1948 compared with 1946:				
Niacin	1946=100	100	146	182
Thiamine	1946=100	100	151	178
Riboflavin	1946=100	100	311	516
Iron	1946=100	100	146	161

1/ Information on items 1, 2, 4, 5 reported by 17 firms to Bureau of the Census; data in item 3 derived from reported information.

Table 7. - Production of major food commodities, calendar years, 1935-39 average, 1946, 1947, 1948, and preliminary estimates for 1949 with percentage comparisons 1/

Commodity	Unit	Average 1935-39	1946	1947	1948	1949 Prel.	1949 as a percentage of 1935-39	1949 as a percentage of 1948
Meats (carcass weight)								
Beef	Mil.lb	6,937	9,373	10,428	9,181	9,400	136	102
Veal	do	1,038	1,440	1,599	1,419	1,300	125	92
Lamb and mutton	do	870	970	802	753	600	69	80
Pork (excluding lard)	do	7,337	11,173	10,601	10,246	10,700	146	104
Total meats	do	16,182	22,956	23,430	21,599	22,000	136	102
Fish (edible weight)								
Fresh and frozen	do	615	759	754	2/	2/	-	-
Canned 3/	do	337	464	483	2/	2/	-	-
Cured	do	74	63	63	2/	2/	-	-
Total fish	do	1,026	1,286	1,300	2/	2/	-	-
Poultry and eggs								
Eggs	Mil.doz	3,335	5,098	5,065	5,057	5,150	154	102
Chicken (dr. wt.)	Mil.lb	2,327	3,597	3,497	3,268	3,834	165	117
Turkey (dr. wt.)	do	350	687	606	509	753	215	148
Dairy products								
Total milk 4/	do	106,450	122,539	121,891	118,337	120,326	113	102
Cheese 5/	do	669	1,101	1,178	1,097	1,200	179	109
Cond. and evap. milk	do	2,225	3,333	3,630	3,831	3,425	154	89
Fats and oils								
Butter, farm & factory (actual weight)	do	2,170	1,505	1,646	1,513	1,675	77	111
Lard 6/	do	1,630	2,138	2,427	7/2,368	2,625	161	111
Margarine (fat content)	do	303	465	606	735	698	230	95
Shortening	do	1,529	1,451	1,374	1,426	1,428	93	100
Other edible fats and oils 8/	do	575	677	1,070	1,257	1,614	281	128
Total fats and oils 9/		6,207	6,236	7,123	7,299	8,040	130	110
Fruits								
Fresh:								
Citrus	do	6,875	9,296	9,992	8,672	8,100	118	93
Apples (commercial)	do	4,385	3,936	3,937	3,185	4,100	94	129
Other (excl. melons)	do	4,703	5,573	5,513	4,989	5,400	115	108
Processed:	do							
Canned fruit	do	1,705	3,094	2,648	2,535	2,600	152	103
Canned fruit juices	do	333	2,442	2,205	2,536	1,990	598	78
Frozen	do	106	525	352	396	400	377	101
Dried	do	1,118	1,014	1,153	889	1,000	89	112

- Continued

Table 7. - Production of major food commodities, calendar years, 1935-39 average, 1946, 1947, 1948, and preliminary estimates for 1949 with percentage comparisons 1/ - Continued

Commodity	Unit	Average 1935-39	1946	1947	1948	1949 Prel.	1949 as a percentage of 1935-39	1949 as a percentage of 1948
Vegetables								
Fresh 10/	Mil.lb	30,520	38,946	35,839	37,874	36,388	119	96
Canned 11/	do	4,030	7,640	6,131	5,767	5,500	136	95
Frozen	do	12/ 78	450	346	446	450	577	101
Potatoes	Mil.bu	355	483	389	446	369	104	83
Sweetpotatoes	do	68	66	56	50	52	76	104
Dry edible beans 13/	Mil.lb	1,360	1,474	1,604	1,955	1,780	131	91
Canned baby foods	do	48	462	353	489	490	1021	100
Sugar, raw basis	1,000 sh.tons	1,948	1,900	2,158	1,917	2,100	108	110
Grains								
Wheat	Mil.bu	759	1,153	1,367	1,288	1,189	157	92
Rye	do	44.9	18.9	26.0	26.4	19.7	44	75
Rice, milled	Mil.lb	1,340	2,044	2,207	2,299	2,386	178	104
Corn, grain only	Mil.bu	2,050	2,951	2,137	3,365	3,200	156	95
Oats	do	1,045	1,498	1,199	1,492	1,380	132	92
Barley	do	239	262	281	317	244	102	77
Peanuts	Mil.lb	1,229	2,038	2,183	2,268	2/	-	-

1/ Calendar year basis except for fresh citrus fruit for which the season begins in the fall of the previous year; dried fruits which are on a pack-year basis; rice on a marketing year. 2/ Not available. 3/ Excludes canned food products containing small quantities of fish such as clam chowder, etc. 4/ Includes total farm production of milk and off-farm production. 5/ Excluding full skim, cottage, pot, and bakers' cheese. 6/ Including amount used in manufactured food and nonfood products. 7/ Revised. 8/ Represents fats used in cooking and salad oils, salad dressing, mayonnaise, bakery products and other minor uses such as fish canning. 9/ Fat content basis except for butter which is on an actual weight basis. 10/ Estimates of all vegetables and melons other than potatoes and sweetpotatoes include reported commercial production for fresh market shipment plus rough estimates of quantities produced in market gardens for fresh sale and farm gardens for home use. Excludes town garden production. 11/ Includes asparagus, beans (lima), beans (snap), beets, carrots, corn, hominy, kraut (including bulk), peas, pickles (including bulk), pimientos, Irish potatoes, sweetpotatoes, pumpkin and squash, tomatoes, tomato pulp and tomato juice, tomato sauce, paste, and catsup and chili sauce, mixed vegetables. 12/ Average 1937-39. Data prior to 1937 are not available. 13/ Cleaned basis.

Table 8. - Retail food prices and total consumer price index, United States 1940-46 and 1947-48 by months
(Index numbers 1935-39 = 100)

Year and month	Meats 1/	Eggs	Dairy products 2/	Fats and oils 3/	Cereals and bakery products	Fruit and vegetables: Fresh	Fruit and vegetables: Canned	Fruit and vegetables: Dried	Sugar and sweets	Beverages	All foods	Consumer price index
1940	96	94	101	82	97	97	92	101	97	92	97	100
1941	108	112	112	94	98	104	98	107	106	102	106	105
1942	126	136	125	120	105	133	122	136	126	122	124	116
1943	134	162	135	126	108	178	131	159	127	125	138	124
1944	130	153	134	123	108	177	130	166	126	124	136	126
1945	131	164	134	124	109	188	130	168	126	125	139	128
1946	161	169	165	152	125	191	141	190	144	140	160	139
1947	217	201	186	198	155	202	166	264	180	187	194	159
Jan.	199	182	190	202	143	184	174	269	176	178	184	153
Feb.	197	170	183	201	144	189	173	270	178	183	182	153
March	208	175	188	219	148	199	173	271	179	187	190	156
April	203	176	179	228	153	201	173	270	179	190	188	156
May	204	179	172	200	154	210	172	268	179	189	188	156
June	217	183	172	188	155	208	170	263	180	181	190	157
July	220	203	179	182	155	204	168	264	180	181	193	158
Aug.	228	212	184	178	156	202	166	263	180	182	196	160
Sept.	241	236	195	177	158	202	157	261	181	187	204	164
Oct.	236	233	190	190	160	201	155	256	182	191	202	164
Nov.	227	225	198	196	163	205	156	252	183	195	203	165
Dec.	227	236	205	208	170	212	158	255	184	198	207	167
1948	246	209	205	196	171	212	158	247	174	205	210	171
Jan.	238	214	206	209	173	216	158	257	183	202	210	169
Feb.	225	189	204	194	172	222	158	256	177	204	205	168
March	225	186	201	192	171	214	158	254	174	204	202	167
April	234	185	206	191	171	228	156	252	174	204	208	169
May	244	185	205	197	171	229	156	250	173	205	211	170
June	255	194	206	200	171	225	157	248	171	205	214	172
July	262	204	209	201	171	223	158	248	171	205	217	174
Aug.	267	220	211	198	171	205	158	249	172	205	217	174
Sept.	265	227	209	197	171	200	159	249	173	206	215	174
Oct.	256	239	203	193	170	197	159	238	173	206	212	174
Nov.	247	244	200	189	170	192	159	231	173	206	208	172
Dec.	241	217	199	184	170	196	159	230	173	208	205	171
1949												
Jan.	236	210	196	175	170	213	159	228	173	209	205	171
Feb.	221	180	192	160	170	225	159	225	174	209	200	169
March	230	180	190	155	170	226	158	228	176	208	202	170
April	234	184	185	150	170	232	157	228	176	208	203	170
May	232	191	183	144	170	235	156	228	176	207	202	169
June	241	198	182	143	170	231	155	227	176	208	204	170

Index numbers from Bureau of Labor Statistics and rounded to the nearest whole number by Bureau of Agricultural Economics.

1/ Includes chicken and fish.

2/ Includes butter.

3/ Excludes butter.

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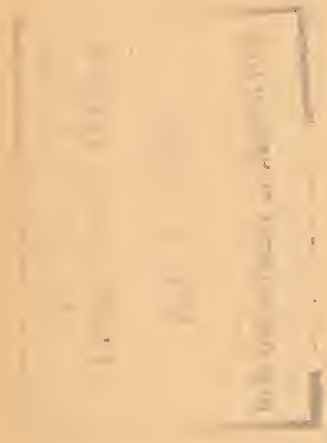

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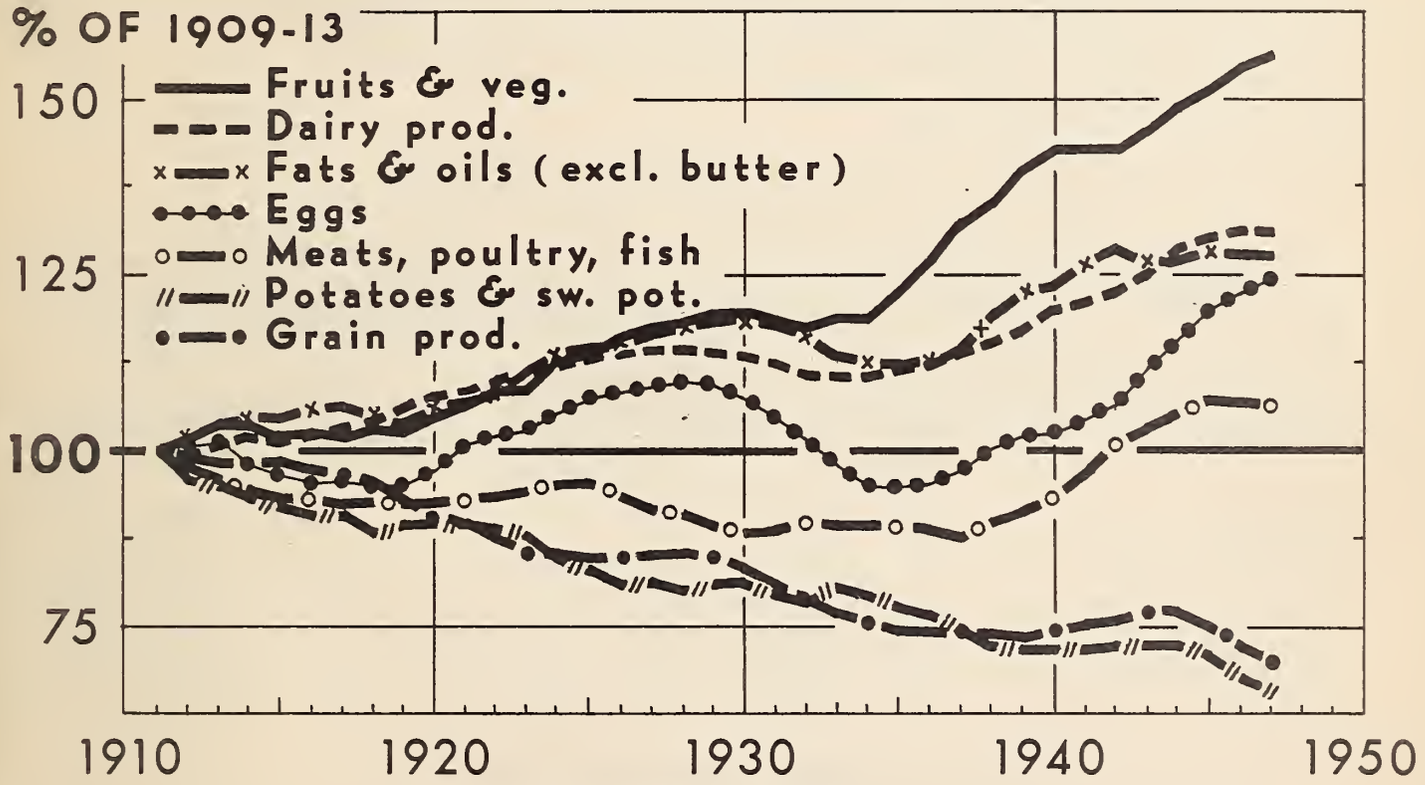
1950 OUTLOOK ISSUE
FOR RELEASE OCT. 30

THE National Food SITUATION

BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

NFS-50 BAE OCT.-DEC. 1949

TRENDS IN OUR EATING HABITS*



5-YEAR MOVING AVERAGE CENTERED
*PER CAPITA CIVILIAN CONSUMPTION, UNITED STATES

U. S. DEPARTMENT OF AGRICULTURE NEG. 43787-XX BUREAU OF AGRICULTURAL ECONOMICS

Significant trends in the average per capita consumption of selected foods by civilians in the United States have been under way over the last 4 decades. Consumption of fruits and vegetables, dairy products, and fats and oils has been increasing, while consumption of grain products and potatoes has been decreasing. The trends reflect changes in eating habits accompanying changes in income, improvements in food marketing and consumer education.

Table 1.-Volume of agricultural production for sale and for farm home consumption and civilian per capita food consumption, 1943-48 and estimates for 1949, with percentage comparisons

(Index numbers, 1935-39 = 100)

Item	1943	1944	1945	1946	1947	1948	1949 Prel. 1/	1949 as a percentage of 1948
Food grains 2/	116	148	155	164	197	184	162	88
Truck crops 3/	124	137	142	158	141	142	135	95
Fruits and nuts 4/	108	123	113	133	129	114	125	110
Vegetables, excluding truck crops 5/	125	106	110	128	107	123	107	87
Sugar crops 6/	81	81	94	103	110	89	93	104
Total food crops 7/	116	129	130	145	148	141	133	94
Meat animals 8/	149	155	147	145	145	134	136	101
Poultry 9/	162	166	170	160	157	153	164	107
Dairy products 10/	113	115	119	119	117	114	116	102
Total food livestock	140	144	142	139	138	131	135	103
Food production	134	140	139	140	140	133	135	102
Agricultural production, food and non-food	129	137	134	137	136	138	137	99
Civilian per capita food consumption	109	112	114	119	115	111	110	99

1/ Production estimates are based on preliminary crop indications as of October 1, and estimated marketings and home consumption of livestock and livestock products for the calendar year 1949.
2/ Includes wheat, rye, rice, and buckwheat.
3/ Includes truck crops for market (artichokes, asparagus, lima beans, snap beans, beets, cabbage, cantaloupe, carrots, cauliflower, celery, cucumbers, eggplant, lettuce, onions, peas, peppers, spinach, tomatoes, and watermelons) and truck crops for processing (asparagus, lima beans, snap beans, beets, cabbage, sweet corn, cucumbers, peas, spinach, and tomatoes).
4/ Includes apples, peaches, pears, cherries, apricots, grapes, strawberries, cranberries, oranges, grapefruit, lemons, olives, dried California figs, fresh and dried plums, almonds, pecans, and walnuts.
5/ Includes dry edible beans, potatoes, and sweetpotatoes.
6/ Includes sugar beets, sugarcane for sugar, sugarcane sirup, sorgo sirup, maple sugar, and maple sirup.
7/ Includes peanuts in addition to the other crops.
8/ Includes cattle and calves, sheep and lambs, and hogs.
9/ Includes eggs, chickens, turkeys, and broilers.
10/ Includes wholesale milk, retail milk, butterfat, farm butter, and farm consumption of dairy products.

Table 2.- Total food utilization: Source and distribution, 1935-39 average and 1940 to 1949 1/

Year	Total food utilization	Source of total food: Food production	Source of total food: Imports	Source of total food: Reduction in stocks	Source of total food: Increase in stocks	Distribution: Civilian	Distribution: Military, including military civilian feeding	Distribution: Department of Agriculture 2/: Net purchases	Distribution: Department of Agriculture 2/: Deliveries	Distribution: Department of Agriculture 2/: Reduction in stocks	Distribution: Department of Agriculture 2/: Increase in stocks	Commercial exports and shipments 3/
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent
Section a. Percentage of food utilization in each year												
1935-39 Av.	100.0	93.9	6.1			97.7		- .2		.2		2.5
1940	100.0	95.1	5.5		.6	98.0						2.0
1941	100.0	94.4	5.8		.2	93.8	2.0	2.4	1.9		.5	1.8
1942	100.0	94.2	3.7	2.1		87.2	5.8	5.9	4.5		1.4	1.1
1943	100.0	95.8	4.8		.6	81.4	9.6	8.1	7.1		1.0	.9
1944	100.0	94.0	5.0	1.0		79.7	13.2	6.0	6.5	.5		1.1
1945	100.0	95.7	4.8		.5	82.3	4/12.0	4.2	5.2	1.0		1.5
1946	100.0	96.1	4.3		.4	89.7	4/ 3.2	4.4	5.2	.8		2.7
1947	100.0	95.4	4.8		.2	89.7	4/ 3.3	2.9	2.8		.1	4.1
1948	100.0	94.5	5.3	.2		91.5	4/ 3.5	2.1	2.2	.1		2.9
1949 Prel.	100.0	95.2	4.7	.1		90.9	4/ 3.5	2.1	1.6		.5	3.5
Section b. Percentage of 1935-39 food utilization												
1935-39 Av.	100.0	93.9	6.1			97.7		- .2		.2		2.5
1940	109.6	104.2	6.0		.6	107.4						2.2
1941	114.4	108.0	6.7		.3	107.3	2.3	2.7	2.2		.5	2.1
1942	125.6	118.3	4.7	2.6		109.5	7.3	7.4	5.6		1.8	1.4
1943	131.3	125.8	6.3		.8	106.9	12.7	10.6	9.3		1.3	1.1
1944	139.9	131.5	7.0	1.4		111.4	18.4	8.5	9.1	.6		1.6
1945	136.4	130.5	6.6		.7	112.2	4/16.4	5.7	7.1	1.4		2.1
1946	136.7	131.5	5.8		.6	122.6	4/ 4.3	6.1	7.1	1.0		3.7
1947	137.7	131.4	6.6		.3	123.7	4/ 4.5	3.9	3.8		.1	5.6
1948	132.1	124.9	6.9	.3		120.9	4/ 4.6	2.8	2.9	.1		3.8
1949 Prel.	133.1	126.7	6.3	.1		121.0	4/ 4.7	2.8	2.1		.7	4.6

1/ The upper section of the table divides the total utilization in each year (1) according to the source of the food and (2) according to its distribution. Both the total utilization figure and the break-down are on an index-number basis; that is, they represent quantities weighted by average farm prices in the period 1935-39. The utilization figure includes both domestically produced and imported foods. The lower section contains the same data expressed as a percentage of total food utilization in 1935-39 instead of total utilization in each year. 2/ The quantities assigned to the Department of Agriculture are food for lend-lease, relief, and purchases for foreign governments, except for meat transactions in the drought years. These quantities are measured (1) in terms of Department of Agriculture purchases from commercial channels and (2) in terms of shipments out of the country. When measured in terms of purchases, additions to Department of Agriculture stocks are included. When measured in terms of shipments, additions to stocks are shown separately. When Department of Agriculture shipments were smaller than the total quantities purchased, stocks were built up; and vice versa. 3/ For the war years, these data indicate the commercial portion of exports and shipments, which is total exports and shipments minus the exports assignable to the Department of Agriculture.
4/ Including procurement for relief feeding in areas occupied by our armed forces.

THE NATIONAL FOOD SITUATION

Approved by the Outlook and Situation Board, October 21, 1949

SUMMARY

Food consumption per capita probably will be at least as high next year as in 1949 and might even increase slightly. Consumer purchases of food will be encouraged next year by the plentiful supplies and by the slightly lower retail prices which appear likely.

Food supplies for the remainder of 1949 and early 1950 are a little larger in general than a year earlier. Very large crops of grain again this year will provide plentiful supplies of cereal products for food, record large feed supplies, and substantial quantities for export. Pork and lard output is increasing even more than seasonally. Milk, butter, poultry, and egg production are at higher rates than a year earlier. Supplies of vegetable oils will again be plentiful. Fresh vegetable output is lower this fall and the 1949 canned vegetable pack was off from the previous year. The potato, dry bean, and dry pea crops are down some but still large relative to demand. The sweetpotato crop showed some recovery from the lows of recent years. Crops of most deciduous fruits are quite large, but citrus fruit output will be smaller this year largely because of a much smaller crop of grapefruit.

The general downtrend in economic activity is likely to reduce consumer purchasing power slightly. Moreover, foreign demand for U. S. food commodities probably will be adversely affected by the continued shortage of dollars and urgent needs of most countries for nonfood items from the United States. Retail prices of food are likely to show some decline, although not as much as the prices received by farmers. Present indications are that 1950 prices received by farmers might average as much as 10 percent below this year's level.

The possibility of a slightly higher overall rate of civilian per capita consumption of food arises from the forecasts of increases in lard, pork, eggs, butter, cheese, canned fish, dry beans, frozen foods and perhaps fresh vegetables. On the other hand, some declines in consumer purchases of ice cream, fluid milk and cream, canned citrus juices, lamb and mutton may take place.

Exports of grains and food products (including edible fishery products) set another new record of 49.5 billion pounds in 1948-49, almost 15 percent above the previous year's high. This is the fourth successive year of record exports. Domestic food consumption per capita declined again this past fiscal year, with weaker consumer demand and lower output of some foods which rank high in U. S. consumer preference, such as meats, and fresh and canned fruits and vegetables. Only small quantities of these foods were exported. Food consumption per capita in 1948-49 was 10 percent above the prewar average.

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Table 3.-Apparent civilian consumption of major food commodities on a per capita basis, calendar years, 1935-39 average, 1945, 1946, 1947, 1948 and estimates for 1949 with percentage comparisons 1/

(Primary distribution weight)

Commodity	Average 1935-39	1945	1946	1947	1948	1949 Prel.	1949 as a percentage of 1935-39	1949 as a percentage of 1948
	Pounds	Pounds	Pounds	Pounds	Pounds	Pounds		
Meats (carcass weight) - Total	126.2	144.4	153.4	155.0	146.4	146.8	116	100
Beef	55.2	59.0	61.3	69.1	63.3	64.1	116	101
Veal	8.1	11.8	9.9	10.7	9.4	8.5	105	90
Lamb and mutton	6.8	7.3	6.6	5.4	5.0	4.0	59	80
Pork (excluding lard)	56.1	66.3	75.6	69.8	68.7	70.2	125	102
Fish (edible weight) - Total	11.1	10.6	11.0	10.8	11.0	2/	-	-
Fresh and frozen	5.3	7.1	6.2	6.2	6.5	2/	-	-
Canned 3/	4.8	2.6	3.8	3.8)	4.5	2/	-	-
Cured	1.0	.9	1.0	.8)				
Poultry products								
Eggs 4/	37.3	49.6	46.8	47.4	48.2	46.8	125	97
Chicken (dressed weight)	17.9	28.8	25.4	23.6	23.0	25.4	142	110
Turkey (dressed weight)	2.6	4.3	4.5	4.5	3.7	4.1	158	111
Dairy products								
Total milk (whole milk equivalent)	801	803	813	794	750	742	93	99
Cheese	5.5	6.6	6.6	6.9	6.8	7.1	129	104
Condensed and evaporated milk	16.7	18.2	18.5	20.4	20.6	20.3	122	99
Fluid milk and cream	340	432	423	398	387	5/375	110	97
Fats and oils - Total, fat content 6/	44.7	38.8	39.7	41.8	42.5	41.5	93	98
Butter, farm and factory (actual weight)	16.7	10.9	10.5	11.2	10.0	10.3	62	103
Lard	11.0	11.6	11.8	12.7	13.0	12.3	112	95
Margarine (actual weight)	2.9	4.0	3.8	5.0	6.1	5.6	193	92
Shortening	11.7	9.1	10.1	9.3	9.6	9.5	81	99
Other edible fats and oils	6.3	6.1	6.2	6.9	7.0	7.0	111	100
Fruits								
Fresh - total	137.7	144.7	140.9	145.5	131.1	129.1	94	98
Citrus	48.9	66.2	58.7	61.9	53.9	47.2	97	88
Apples (Commercial)	30.4	22.9	23.2	25.2	25.8	24.8	82	96
Other (excluding melons)	58.4	55.6	59.0	58.4	51.4	57.1	98	111
Processed								
Canned fruit	14.9	14.3	21.8	18.2	18.0	18.2	122	101
Canned juices	3.9	10.9	17.7	16.3	18.1	14.9	382	82
Frozen	.8	2.3	3.1	3.2	3.0	3.0	375	100
Dried	5.8	5.9	4.5	4.4	4.0	4.0	69	100
Vegetables								
Fresh	235	267	271	251	255	243	103	95
Canned	29.9	42.9	7/ 46.5	40.0	36.8	36.2	121	98
Frozen	8/ .4	1.9	2.0	2.6	3.0	2.9	725	97
Potatoes	131	126	127	123	108	110	84	102
Sweetpotatoes	21.4	18.8	7/ 18.2	7/ 15.9	12.8	13.8	64	108
Dry edible beans	8.8	7.7	8.7	7/ 6.6	7.3	7.5	85	103
Sugar, refined	97.0	73.5	74.4	91.1	95.6	93.3	96	98
Grains								
Corn products:								
Corn meal	22.9	18.0	15.9	14.6	14.5	15	66	103
Corn sirup	7.6	11.9	11.8	12.8	8.2	9.0	118	110
Corn starch	1.3	1.9	1.8	1.9	1.7	1.7	131	100
Corn sugar	2.7	3.9	3.8	4.5	4.0	4.2	156	105
Breakfast cereals	1.6	2.2	2.0	1.7	1.5	1.6	100	107
Hominy	1.4	2.3	2.4	2.4	2.4	2.4	171	100
Oatmeal	3.9	3.6	3.7	3.5	3.2	3.2	82	100
Barley food products 9/	1.4	1.5	2.0	1.9	1.5	1.5	107	100
Wheat:								
Flour 10/	153	158	154	135	135	135	88	100
Breakfast cereals	3.7	3.7	3.5	3.5	3.5	3.5	95	100
Rye flour	2.2	2.6	1.9	1.7	1.6	1.6	73	100
Rice, milled	5.6	4.9	4.0	5.8	4.8	4.5	80	94
Beverages								
Coffee 11/	14.0	16.3	19.9	17.3	18.9	17.8	127	94
Tea	.67	.55	.52	.55	.55	.56	84	102
Cocoa beans	4.4	4.0	4.2	4.2	3.7	4.1	93	111
Peanuts (shelled)	4.4	6.4	5.0	4.7	4.4	4.4	100	100

Population estimates used to obtain per capita consumption figures are official Census estimates of total population adjusted for underenumeration of children under 5 and for military personnel not eating out of civilian supplies.
1/ Data on calendar year basis except for dried fruits which are on a pack year basis; fresh citrus fruits and peanuts on a crop year basis, rice on August 1 year. All years begin in year indicated except for fresh citrus, which begins in October of the previous year and rice which begins in August of previous year. 2/ Not available. 3/ Excludes canned food products containing small quantities of fish such as clam chowder, etc. 4/ In terms of number of eggs, the apparent per capita consumption was 298 in 1935-39, 397 in 1945, 374 in 1946, 379 in 1947, 386 in 1948 and 374 estimated for 1949. 5/ Represents a revision of data shown in the October 8, 1949 issue of the Dairy Situation. 6/ Computed from unrounded data. 7/ Revised. 8/ Average 1937-39. Data prior to 1937 are not available. 9/ All barley food products in terms of malt equivalent. 10/ Includes white, whole wheat, and Semolina flour. 11/ Green bean basis.

RETAIL FOOD PRICES

The consumer demand for food in the United States is expected to continue relatively high but may ease somewhat from 1949 levels. Although a further downward drift in general economic activity is in prospect, consumer real incomes and expenditures probably will not change much. The relatively slow decline in retail prices is expected to continue, with retail food prices gradually reflecting more of the decreases in farm and wholesale prices which have occurred since mid-1948.

A number of factors will contribute to the maintenance of fairly high economic activity. These include continuation of large expenditures both for aid to foreign countries and for the national defense, a prospective insurance refund of almost 3 billion dollars to veterans by the Federal Government, and heavy State and local Government expenditures for construction of public buildings and highways. However, smaller capita expenditures by business for new plant and equipment and slackening consumer demand for some goods may reduce economic activity slightly next year.

Foreign demand for food in 1950 may show some decline from the previous year's level. Production of food crops and livestock in Europe in 1949 is almost as large as a year earlier. Sizeable imports are again desired by many countries to increase consumption and to permit further rebuilding of stocks. However, the shortage of dollar resources and the devaluation of foreign currencies may make importation of food from the United States somewhat more difficult next year.

The domestic demand and supply situation for individual food commodities will vary considerably, of course. Some decrease in retail prices is to be expected in those foods such as pork whose supplies are likely to be increased substantially. As compared with 1949, retail prices are also expected to average lower for most dairy products, fats and oils, poultry and eggs, potatoes, fresh vegetables and apples. For the other foods, not much change from 1949 levels is anticipated. For many commodities the retail price declines probably will be limited as a result of price support programs and the rigidity of marketing costs.

U.S.D.A. Misc. Pub. 691, "Consumption of Food in the United States, 1909-48", can be purchased from the Superintendent of Documents, Washington 25, D. C. It contains basic data on supplies, distribution, and consumption of all major food commodities; descriptions and evaluations of sources and methods used; and supplementary information useful for statistical analysis of the demand for food.

NUTRITIONAL REVIEW 1/

Since 1945 and 1946, there has been a downward trend in the supplies of most of the major nutrients available for consumption. In 1950 it appears that this trend will be halted. Increases in the domestic consumption of many foods will result in slightly larger per capita quantities of food energy, protein, iron, vitamin A value, thiamine, and ascorbic acid.

1/ Prepared in cooperation with the Bureau of Human Nutrition and Home Economics.

The continued decrease in the per capita consumption of fluid whole and cream for the fifth consecutive year will reflect slight decreases in calcium and riboflavin in 1950. Both calcium and riboflavin will approximate an 11 percent decrease from 1946, the peak year.

The greater consumption of fats in 1950, especially of butter and lard, will cause the slight upward trend in food energy. The somewhat larger per capita intake of green and yellow vegetables, eggs and butter will increase the vitamin A value content of the average diet. Also increased will be protein because of more eggs and meat in the diet.

Although the freeze damage and the recent tropical storms will result in a smaller citrus crop, the ascorbic acid available for civilian consumption in 1950 will be slightly above the 1949 level because of anticipated increases in consumption of leafy, green, and yellow vegetables and tomatoes.

In general, the major nutrients available for consumption in 1950 will range from 11 to 14 percent below the peak year levels in 1945 and 1946 but are expected to be well above the 1935-39 average.

Table 4.- Nutrients available for civilian consumption per capita per day, calendar years, 1935-39 average, 1945 to 1948 and preliminary estimates for 1949, with percentage comparisons 1/

Nutrients	Units	Aver-age 1935-39	1945	1946	1947	1948	1949 Prel.	1949 as a percentage of 1935-39	1949 as a percentage of 1948
Food energy	Cal.	3,240	3,350	3,380	3,350	3,240	3,210	99	99
Protein	Grams	89	103	105	98	94	92	103	98
Fat	Grams	131	140	146	144	141	141	108	100
Carbohydrate	Grams	429	422	417	420	401	399	93	100
Calcium	Grams	.92	1.11	1.14	1.08	1.04	1.03	112	99
Iron	Mg.	14.0	18.8	19.1	18.1	16.5	15.7	119	99
Vitamin A value	I.U.	8,100	9,800	9,500	8,800	8,700	8,400	104	97
Thiamine	Mg.	1.55	2.24	2.35	2.13	2.05	2.02	130	99
Riboflavin	Mg.	1.83	2.58	2.61	2.46	2.37	2.33	124	98
Niacin	Mg.	15.5	21.8	21.9	20.7	19.2	19.2	124	100
Ascorbic acid	Mg.	114	139	137	130	123	117	103	95

1/ Data computed by the Bureau of Human Nutrition and Home Economics on the basis of estimates of apparent civilian consumption (retail basis) including estimates of consumption from urban gardens, supplied by the Bureau of Agricultural Economics. No deductions have been made in the nutritent estimates for the loss or waste in the home or for the destruction or loss of nutrients during the preparation of food. Deductions have been made for inedible refuses. The data for 1945-49 for iron, thiamine, riboflavin, and niacin include the amounts of these nutrients added to prepared cereals, bread and white flour under the enrichment program.

COMMODITY REVIEWS

Meats

Meat supplies are increasing seasonally, and consumption in the October-December quarter will be noticeably larger than in the fourth quarter last year.

Pork will account for most of the increase in supplies in the fourth quarter this year over last. Last spring, 15 percent more pigs were saved than in the spring of 1948. Those pigs are now being marketed as slaughter hogs, and although an unusually large number were slaughtered before October 1 and average weights are somewhat lighter this year, probably at least 10 percent more pork will be produced from October through December this year than a year earlier.

Beef supplies will be about the same this October-December as last, with a larger proportion of it the better quality beef that comes from grain-fed cattle. On August 1, 24 percent more cattle and calves were on feed in the Corn Belt than a year earlier. Even though a higher percentage was expected to be sold before October 1 this year than last, the number on feed is being maintained by a high rate of movement of feeder stock to Corn Belt areas. The number of feeder cattle and calves received in 8 Corn Belt States in August and September was the largest for those months in 12 years of record.

As has been true in all of 1949, there will be less veal and less lamb and mutton in the fourth quarter this year than last.

The general upswing in meat output which has taken place in recent months, largely resulting from the bumper 1948 corn crop, will continue and probably be extended through 1950. Total meat consumption in 1950 may be close to 150 pounds per person, compared with 147 pounds in 1949, 146 in 1948, 155 pounds in 1947, and the 1935-39 average of 126 pounds. Again as in 1949, the significant increase will appear in supplies of pork, which in the first 9 months of next year will probably be 10 percent or more above those this year because of the gains now indicated in the 1949 pig crops. The 15 percent larger 1949 spring pig crop will govern supplies through about next March. From April to September, pork supplies will be determined principally by the number of pigs saved from the fall crop of 1949 for which farmers' intentions last June indicated a 13 percent increase in the number of sows farrowing.

A further increase in the pig crop next spring, which now seems likely, would result in more hogs for slaughter, and more pork produced in the fall of 1950 than of 1949. Total pork production next year may provide for a consumption of around 75 pounds per person, which would be 5 pounds more than in 1949.

Cattle numbers are now increasing slowly. If the rate of change does not accelerate next year, production of beef and veal will be approximately the same next year as this. As in 1949, a larger proportion than usual of the 1950 beef supply will be of the better grades, because of a high level in cattle feeding.

Numbers of sheep and lambs are being nearly stabilized this year, in contrast with the sharp reductions in each year from 1942 to 1948. Slaughter has been small in 1949, and the consumption of lamb and mutton per capita is the lowest for at least a century. If sheep herds are built up somewhat next year, even less lamb and mutton will be consumed.

Demand for meat has been strong so far this year. The record is quite different from the sharp reduction in the second half of 1948, when an adjustment occurred from the unusually high relation of meat prices to other prices and incomes that prevailed just after the war. Consumer demand for meat is strong enough to maintain a rather high level of meat prices so long as employment and incomes are well maintained and meat supplies are not increased greatly. If incomes continue close to present levels, the 1950 outlook is for only small reductions in prices of beef and veal, for a moderately lower level of pork prices, and for lamb prices relatively higher than prices of other meats. Prices are likely to fluctuate seasonally about as usual. Prices of beef may decline somewhat late this year and continue down slightly for some months thereafter. Peak prices for the better grades of beef usually come in late summer, and are likely to do so again in 1950. Prices of pork may fall substantially this fall, then advance seasonally in late winter. Their peak also is likely in the late summer of 1950, and a larger spring pig crop next year could result in a notable seasonal decline again in the fall of 1950, perhaps to the lowest pork prices since the war.

Trends in general demand will naturally affect these prospects for prices. As a rule, average meat prices follow incomes of consumers rather directly and proportionately.

Foreign trade in meat is rather insignificant in comparison with domestic consumption. Prospects are for some increase in exports next year, but neither exports nor imports are likely to amount to much more than one percent of domestic production.

Fish 1/

Civilian consumption of fishery products during the remainder of the year is expected to be at about the same rate as in the latter part of 1948 with supplies, especially of canned fish, somewhat larger than a year earlier. Retail prices of fresh and frozen fish probably will increase seasonally, while declines from recent levels are anticipated for canned fish. As compared with the same months of 1948, retail prices of fishery products will be lower during the latter part of 1949.

Commercial fishing activity and, consequently, the commercial freezing of fish will decline seasonally as winter approaches. October 1 cold storage stocks of frozen fishery products for human consumption were 128.9 million pounds, 6 percent above a year earlier. The output of canned salmon, particularly of pink salmon, and pilchards in 1949 will exceed last year's production while the Maine sardine pack will be somewhat lower. The output of canned tuna probably will be somewhat lower than the record 1948 pack.

1/ Prepared in cooperation with the Fish and Wildlife Service, U. S. Department of the Interior.

Imports of fresh and frozen groundfish and rosefish fillets this fall are not expected to vary much from the quantity received from abroad in late 1948. However, exports of fishery products during the remainder of 1949 may not be as high as a year ago.

Supplies of fishery products are expected to be plentiful during 1950. Civilian demand for fish is likely to continue strong throughout most of the year, although somewhat weaker than in 1949. Retail prices of fish are expected to average below the 1949 level, especially if market supplies of livestock products increase as is currently anticipated.

Imports of fish in 1950, especially frozen groundfish and rosefish fillets, are likely to be somewhat larger than in 1949. The devaluation of foreign currency in terms of American dollars makes it more advantageous than in recent years for foreign producing areas to sell fish in the United States.

Poultry and Eggs

Fewer eggs than a year earlier, but more turkey and chicken are expected to be available for domestic consumption during the remaining months of 1949. The seasonal low point in fresh egg supplies is now at hand, and current prices are seasonally high but the average monthly prices from now until spring will be successively lower. The quantity of shell eggs in commercial cold storage on October 1 was only a quarter of the supplies held on October 1, 1948. Current egg production is running somewhat above the comparable 1948 level.

Large supplies of chicken meat are currently available because of the seasonally large marketings of chickens from a poultry population that exceeds last year. Also almost 30 percent more broiler chicks were placed in the third quarter of this year than in July-September 1948. These chicks will be marketed in October through December. The 1949 turkey crop is 29 percent larger than that of 1948, so supplies for the holiday season are much more plentiful and prices substantially lower than the year before.

Supplies of eggs in 1950 will be sufficient to maintain rates of per capita consumption at least as high as the 1949 average of 374 eggs per person, and a slight increase in consumption appears possible. The production of poultry meat may be moderately reduced from the 1949 level, but per capita supplies of both chicken and turkey will remain well above the prewar levels. For the year as a whole, 1950 prices for eggs, chickens and turkeys are likely to average less than in 1949.

Egg production in the first six or eight months in 1950 may be 3 or 4 percent larger than in those months of 1949. This follows from the expected expansion of about that percentage in the numbers of hens and pullets in farm laying flocks on January 1, 1950 compared with January 1, 1949.

Egg production and supplies for the later months of 1950 will depend in part upon the extent to which laying flocks will be replenished by pullets hatched in the spring of 1950. On the basis of prospective cost-return relationships, the 1950 hatch is expected to be moderately smaller than in 1949. Feed for chickens is plentiful, and although prices are high for protein feeds which must be used to balance the ration, egg prices are sufficiently high to offset considerably the high production expenses. The 1950 hatch will continue poultry output at a level which, though possibly lower than this year, will be high by all prewar standards.

Chicken meat supplies in 1950 are expected to be somewhat lower than in 1949. If present expectations regarding the number of layers carried over on January 1, 1950 are borne out, supplies of mature farm chickens will be slightly higher than in the current year. Marketings of young birds from farms will be in proportion to the 1950 spring hatch. Roughly two-thirds of the annual chicken meat supplies come from farm flocks which are kept primarily for egg production. Supply of chicken meat from broiler output, which accounts for the remainder, is expected to continue near the 1949 rate.

The 1950 outlook for turkey consumption and price divides into two periods. In the first half of the year consumption is normally light. Large supplies will be carried over from the large 1949 turkey crop, and prices will be near present levels. The turkey output for the 1950 holiday season might be smaller than the crop now being marketed, depending largely upon the returns from the 1949 season and the price outlook in the spring of the year.

Dairy Products

Output of dairy products is approaching the seasonal low for 1949. Milk production on farms so far this year has been about 2 percent above the rate of a year earlier. Per capita consumption of fluid milk and cream has not been quite equal to that of a year earlier. More milk has been available for manufactured dairy products.

The pattern of output of the manufactured dairy products varies considerably from that of a year ago. Production of cheese, butter and nonfat dry milk solids is substantially greater, while that of most of the other items such as evaporated milk, dry whole milk and ice cream is smaller. Exports of dairy products have declined during the second half of 1949. With demand less strong than a year ago, the Government has made substantial purchases of dairy products. Up to mid-October, the Department had purchased 107 million dollars worth of dairy products, including quantities of nonfat dry milk solids used for export programs. Included in this value figure are the following quantities: butter, 92 million pounds; cheese, 30 million pounds; and nonfat dry milk solids (dry skim milk), 361 million pounds. Prices for fluid milk and cream are down a little and all manufactured dairy products have been considerably lower than a year ago.

Civilian supplies of milk and manufactured dairy products in 1950 probably will increase from the near-record low consumption rate per capita of 742 pounds, in terms of whole milk equivalent, fat solids basis, in 1949. Per capita consumption of the nonfat ingredients of milk probably declined slightly from 1948 to 1949. But the 1950 rate is not likely to differ much from that of 1949, and will be substantially above the prewar average level. With some decline in consumer money incomes and some downward adjustments in other food and nonfood items in prospect for 1950, retail prices of dairy products as a group in 1950 probably will be slightly lower than the average level for the current year. To date, retail prices have declined much less for fluid milk and cream than for the manufactured dairy products. This general relationship probably will continue through most of 1950 at least. So far, also, retail prices for the manufactured dairy products have not declined proportionately with their wholesale prices, and even after allowing for increased marketing costs, further reductions at retail are likely, even should there be no reductions at wholesale.

Production of milk next year is likely to be at least as great as in 1949, and possibly slightly greater. The decline in cow numbers has come to an end, after extending over a record period of 5 years. Supplies of feed concentrates per animal unit are at a record high level for the 1949-50 feeding season. These favorable influences will tend to be offset in part, however, by the fact that prices received by farmers for dairy products will be below the long-time averages, both with respect to feed prices and to prices for meat animals.

Exports of whole milk products in 1950 are likely to be smaller than in any year since 1940. An important factor accounting for the falling off of U. S. exports of dairy products is the rather sharp increase in milk production in the foreign countries. In Western Europe, for example, milk production in the second quarter of 1949 was larger than a year earlier by as much as 28 percent. Most of these countries are about up to the prewar average level and further substantial increases are likely in the next few years. The growing dollar shortage abroad, and the recent foreign currency devaluation are expected to curtail U. S. exports.

With smaller exports of dairy products in prospect for 1950, and milk production at least as great and possibly greater than in 1949, more milk will be available for domestic use in the variety of forms. Since fluid milk and cream consumption per capita may decline slightly further, supplies of milk for manufactured dairy products will be increased significantly. The greatest expansion among the manufactured dairy products is likely to come in butter.

Per capita supplies of butter in 1950 may be somewhat greater than in 1949, but probably still smaller than the prewar average. Consumption of most other manufactured dairy products in 1950 may be little different from the 1949 levels.

Fats and Oils

Supplies of food fats in the last quarter of 1949 will be more plentiful at lower prices than in late 1948. Butter production is well above the rate of output at this time last year and Government stocks of butter are substantial. The price of butter is near the support level. The U. S. Department of Agriculture purchased 92 million pounds of butter from July through mid-October for price support purposes. Production of oilseeds in 1949 is large, although smaller than last year's record output, and crushings this fall are again heavy. More lard will be available because the 1949 spring pig crop was 15 percent larger than a year earlier. Although spring pigs began to move to market earlier than usual this fall (an estimated 1.5 million had been slaughtered by October 1), hog slaughter and lard production in October-December are likely to be at least 10 percent larger than a year earlier. Exports of food fats in October-December 1949 probably will be large but not at as high a rate as in the first six months of 1949. In view of the large supply of food fats, prices in October-December are likely to remain relatively low.

Domestic consumption of food fats may increase slightly in 1950 with supplies at least as large as in the current year and a prospect of lower average prices to consumers. Most of the increase in supplies is likely to be in butter and lard. In the 1949-50 marketing year, domestic production of butter, lard, edible tallow and other edible beef fats, and vegetable oils used for food probably will total moderately larger than in 1948-49. Supplies again will be substantially larger than the quantity that will be consumed in the United States. In 1948-49 there were large exports of lard, soybeans, soybean oil, peanuts, peanut oil, and cottonseed oil.

Production of butter is likely to be larger in 1950 than in 1949. Prices of butter in 1950 will be largely determined by the Government support level. The Agricultural Act of 1949, passed by Congress on October 19, provides for support of butter fat prices at 75 to 90 percent of parity after the beginning of the year. If prices in 1950 are moderately lower than a year earlier, butter consumption probably will increase somewhat over the estimated 1949 rate of 10.3 pounds per person. During the first 9 months of 1949 the retail price of butter averaged 72 cents per pound. In October 1949 the support price for butter at the wholesale level was 62 cents per pound (for 92 score in carload lots). This corresponds to about 72 cents per pound at retail.

Domestic disappearance of lard in 1949 is estimated at 12.3 pounds per capita, moderately less than a year earlier. The retail price of lard in August 1949 was about 19 cents per pound, compared with 29 cents per pound

a year earlier. The price is likely to remain low and a moderate increase in the consumption of lard is likely in 1950. Output of lard in 1950 may be 2.8 to 2.9 billion pounds compared with about 2.6 billion in 1949.

Consumption of margarine in 1950 might decline slightly from the 1949 level of about 5.6 pounds (actual weight) per person as a result of the possible decline in the price of butter and increase in its consumption. This will continue the trend started in the fall of 1948. Margarine prices are considerably below their historical average relationship with those of butter (half the price of butter) and this factor probably will help to maintain margarine consumption near the 1949 level. The average retail price of margarine in leading cities of the United States declined from 43 cents per pound in August 1948 to 30 cents in August 1949.

Consumption of shortening in 1950 may be no greater than the estimated 9.0 pounds per person consumed in 1949 because of strong competition of lard, which is now priced materially lower than shortening, and is likely to remain relatively low-priced in view of the outlook for greater production of lard and smaller production of the vegetable oils used in making shortening. The average retail price of shortening in containers other than cartons (mostly hydrogenated shortenings) declined from 43 cents per pound in August 1948 to 33 cents in August 1949. The relative decline in shortening prices was not so large as those for lard or margarine.

Domestic disappearance of other food fats and oils -- largely cottonseed, soybean, corn, peanut, olive, and coconut oils used as cooking and salad oils, in mayonnaise and salad dressings, and in bakery goods and confectionery -- in 1950 may be about the same as the estimated 7.0 pounds per person consumed in 1949. Although production of edible vegetable oils in the year beginning October 1949 may decline compared with a year earlier, it will still be one of the largest on record and sufficient to support a per capita disappearance of about 7.0 pounds, as well as substantial exports. These food uses of fats and oils showed a strong upward trend before the war and are now back to about the 1937-41 average, after a decline in the war years.

Exports of food fats and oils including peanuts and soybeans for crushing from the United States are likely to be large in the year beginning October 1949, although probably not as large as a year earlier. For a few months following the relaxation of U. S. export controls in February 1949, there was a very large outflow of fats and oilseeds from the United States. This probably met the most urgent demands and restored inventories in many countries to a better working level. However, consumption per person is still well below prewar in many European countries, and ECA financing and Army purchases for occupied areas probably will again keep exports to Europe and Japan relatively high. In 1948-49 there were large exports of soybeans, soybean oil, peanuts, peanut oil, cottonseed oil and lard.

Fruit

Supplies of most fresh and processed fruits will continue moderately larger this winter and next spring than in the same period of 1948-49. The principal exception is grapefruit with supplies likely to be considerably smaller. Prices for deciduous fruits are expected to continue lower than last winter and spring. Grapefruit and orange prices are expected to be higher this fall than a year earlier; in the winter and spring grapefruit prices will be about the same as in spring of 1949 and oranges lower. Per capita consumption of fresh deciduous fruits this fall and next winter probably will be moderately larger than a year earlier, but that of citrus fruits, especially grapefruit, will be smaller. Total consumption of fruit in 1949 on a fresh equivalent basis will be slightly less than the 216 pounds in 1948.

With the record large pear crop and the largest commercial apple crop in 10 years, supplies of these two fruits will continue plentiful this winter and spring at prices markedly lower than a year earlier. Substantial quantities of grapes also will be available this fall and winter at lower prices. Supplies of fresh cranberries this fall will be about as in the fall of 1948, but prices may continue a little lower. Total production of deciduous fruits in 1949 is about one-sixth larger than that in 1948 and nearly as large as the record in 1946. Prices received by growers this year for most of these fruits were the lowest since 1942.

Supplies of fresh oranges from the 1949-50 crop, now starting to market, probably will be a little larger than those from the 1948-49 crop. Although prices probably will be a little higher this fall than last, they may decline next winter and spring whereas they advanced in 1949 after the January freeze reduced the crop. In contrast, supplies of grapefruit will be considerably smaller than those marketed last year before the January freezes. The smaller supplies this fall are the result both of the freeze damage last winter to trees and fruit buds, and of storm damage this summer to the nearly ripened fruit. This will mean higher prices for grapefruit this season although prices later this fall will decline seasonally. Supplies of lemons will continue small and prices will be high until the new crop starts to market in November. Thereafter, supplies will be larger and prices probably lower. For the 1949-50 season as a whole, supplies will be a little larger and prices probably somewhat lower than was true for the 1948-49 crop.

Bananas will continue to provide the largest tonnage of imported fresh fruits. Although they are now being imported at near the prewar rate, because of the increase in population, consumption of nearly 20 pounds per person per year is still more than 3 pounds under the prewar (1935-39) rate. Somewhat smaller quantities of canned pineapple and pineapple juice probably will be received from Hawaii due to labor and transportation difficulties there this year.

Total supplies of tree nuts this fall and winter will be about the same as a year ago, although pecans will be less plentiful. The total domestic crop of tree nuts is expected to turn out a little larger than the 1948 record of 200,000 tons, in the shell. But imports, which consist mostly of Brazil nuts and cashews and some almonds, walnuts, filberts and other nuts, are expected to be smaller in the 1949-50 season than in 1948-49. However, total supplies will be large enough to permit per capita consumption to continue at the rate of a pound to a pound and a half (shelled) per year. Prices for most tree nuts probably will be lower than last year.

Most dried fruits will continue plentiful this fall and winter at about corrent prices. This year's pack of raisins is much larger, but that of dried prunes is about the same. Supplies of some of the minor dried fruits such as peaches and pears also will be larger than last year. Although total supplies of dried fruits are expected to be considerably larger than in the 1948-49 season, per capita consumption probably will continue at the 4 pound level. As in the last two seasons, supplies will be considerably larger than will readily move into domestic consumption at the current level of prices. Surpluses to the extent of 271,000 tons in the 1947-48 season and 124,000 tons in the 1948-49 season were purchased by the United States Department of Agriculture. These purchases were used to some extent for the School Lunch and institutional feeding programs, but most of the supplies were shipped abroad to areas under military occupation. A relatively small quantity of dried prunes and raisins will be procured out of the 1949-50 pack for the domestic programs, but no other purchases by the Department of Agriculture are anticipated. The removal of dried fruit supplies which are in excess of domestic requirements will be facilitated by the export and diversion payment programs operated by the Department.

With a 1949-50 pack of canned deciduous fruits about the same as the 1948-49 pack and total stocks at the beginning of the pack season considerably larger than a year earlier, total supplies of canned deciduous fruits will be somewhat larger in the 1949-50 season than in the preceding season. Larger packs of peaches, pears, apples and applesauce, sweet cherries, and plums will be about offset by smaller packs of other fruits. The 1949-50 pack of citrus segments probably will be a little smaller than the 1948-49 pack. Total consumption of canned fruits probably will average 19 pounds per capita in the 1949-50 season, about 1 pound more than in the 1948-49 season.

Supplies of canned citrus juices will be smaller than usual this fall, but are expected to become more plentiful after the new pack season gets well under way. Even so, supplies probably will be somewhat smaller than in the last few years principally as a result of the smaller grapefruit crop and the utilization of increasing quantities of oranges for the manufacture of frozen concentrated orange juice. Carry-over stocks of

canned citrus juices this fall are the lowest in several years. Supplies of canned deciduous juices from the 1949-50 pack probably will be a little larger than comparable supplies a year ago. But supplies of canned pineapple juice from Hawaii may be smaller. Per capita consumption of canned fruit juices in 1949 is expected to be about 3 pounds under the 18 pounds in 1948. Some of the effect of the lower production of canned citrus juices will be offset by reducing the stocks of these juices.

Consumption of frozen fruits, fruit juices, and berries in 1949 was maintained at the 1948 rate of 3 pounds per capita by a small increase in production and by drawing further on stocks. Supplies are expected to be large enough this fall and next winter to maintain the 3-pound rate. Contributing significantly to the maintenance of the 3-pound rate of consumption in 1949 is the sharp increase in supplies of frozen concentrated citrus juices, mostly orange. Production in 1949 was about 4 times that of 1948, and a further large increase seems likely for 1950. Cold-storage holdings of frozen fruit items on October 1, 1949, totaled about 354 million pounds, compared with nearly 340 million on September 1, 1949, and 364 million on October 1, 1948. Principal items in storage on October 1, 1949 were strawberries, cherries, and fruit juices and purees, which together made up slightly over half of the total.

Vegetables

The prospects for vegetable supplies for the late fall and winter are rather mixed this year -- with less fresh and canned vegetables; more frozen vegetables; good supplies of potatoes and sweetpotatoes in comparison with expected demand; and plenty of dry beans and peas.

Supplies of the major vegetables for fresh market shipment will be about 11 percent smaller this fall than last, with increases only in 4 crops, (celery, cauliflower, eggplant and green peppers) compared with last year; and aggregate supplies of 13 crops about equal to the 1938-47 average. The crops of onions, cabbage, and carrots which go into storage for winter use are below average. Prices of most fresh vegetables are expected to average substantially higher than last fall. Because of the anticipated smaller carry-over of cabbage, onions, and carrots next January than a year earlier, prices for these vegetables probably will be much higher this winter than last.

Prospective acreages of artichokes, cabbage, cauliflower, and kale for winter season harvest vary only slightly from the acreages harvested last winter. The winter crop of shallots is about one-fifth smaller than that of last winter.

The lifting of Canada's ban on imports of fresh vegetables from the United States probably will result in increased export trade during our winter season.

Canned vegetable supplies for U. S. consumption in the first half of 1950 are smaller in general. The 1949 pack of canned vegetables was about one-tenth less than that of 1948. June 1 stocks of canned snap beans and green peas were smaller, while those of sweet corn, tomatoes and tomato juice were larger than those of a year earlier. The relatively high level of consumption of most canned vegetables is likely to continue throughout 1950. Supplies of frozen vegetables will be larger than in the first half of 1949. Not much change in prices is expected.

Total supplies of potatoes for this fall, winter and early next spring are much smaller than those of a year earlier but prices to consumers may be slightly lower than last year, since last year's prices were sustained by support operations aimed at 90 percent of parity. This year's crop has support at 60 percent of parity, but in general will sell well above support levels. Consumption per capita in 1950 probably will be at about the same level as in 1948 and 1949. While per capita consumption of potatoes over the next several years probably will continue to drift downward, the rate of decline may not be as abrupt as in the past several decades. No improvement in export demand for potatoes is foreseen for 1950; however exports of potatoes have normally been rather negligible.

While the 1949 crop of sweetpotatoes is slightly larger than the 1948 crop, it remains much below the recent 10 year average. Prices may average slightly lower than for the 1948 crop and consumption per capita may recover very slightly. However, no immediate reversal of the long-time gradual downward trend in apparent consumption per capita is expected in the next year or two. If production in 1950 is near that of 1949, prices may be slightly lower.

Much larger supplies of dry beans are in prospect for the next six months than was the case at this time last year. The 1949 crop, third largest of record, adds to a record-large carry-over at the end of the 1948 crop-marketing year. Only the Government price support program at 80 percent of parity keeps most bean prices from falling to extremely low levels. For 1950, it is probable that some effort will be made to restrain acreage and production.

Although smaller supplies of dry field peas are in prospect for the next 6 months, the reduced supply is about offset by the expected further reduction in the already weak export demand. Prices are very much lower this year, with support at 60 percent of parity, than they were for the 1948 crop at the 90 percent level. Prospects for peas in 1950 are similar to those for dry beans.

Grains

The outlook for supplies and consumption of grains and their food products in the year ahead is quite similar to the situation of 1948-49. The rice crop was a record high. The 1949 crops of wheat and corn, were of near-record proportions and large stocks were carried over from the previous year's crops. Although the retail prices of some of the products may be slightly lower next year, reflecting further the decline of the past year in grain prices, little change from current rates of domestic consumption per person appears likely. Accordingly, large supplies of these grains will be available for export.

Wheat - This year's wheat crop totals 1,126 million bushels according to October 1 estimates. In addition, stocks amounting to about 293 million bushels were carried over from the previous crop year. Only about half of the total supply of wheat for the new crop year is expected to be used for food, feed, seed and other domestic purposes, with perhaps 480 million bushels for food, 130 for feed, and 85 for seed. Out of the balance will come the wheat for exports which might amount to 400 to 450 million bushels. Part of the reduction from 501 million bushels wheat equivalent of 1948-49 exports and 479 in 1947-48 will come from smaller shipments of wheat and flour to civilians in areas under U. S. military occupation.

After having reached seasonal low levels, wholesale flour prices were slightly higher in September than in July and August, reflecting the rise in wheat prices. For the 1949-50 year, flour prices may average slightly below a year earlier.

Rye - While total rye supplies are relatively small, they are more than sufficient to satisfy the food demand. Domestic supplies of rye for 1949-50 are estimated at 27.1 million bushels, which compares with 29.7 million available for 1948-49. With the exception of 1946-47, when supplies totaled 21.3 million bushels, this is the smallest supply in 50 years. While rye prices have been advancing, there is only a relatively small quantity of rye flour used in bread so that it is not likely that there will be much, if any, change in the price of rye bread.

Although rye stocks on July 1, 1949 were larger than in the preceding three years, the new crop was the smallest in nearly 75 years with the exception of 1934.

Each of the items of domestic disappearance in 1949-50 is expected to be similar in quantity to those of a year earlier, when 5.6 million bushels were used for food, 6.0 million for feed, 4.5 million for seed, and 6.7 million for alcohol and spirits. Exports, estimated at possibly 4 million bushels may exceed imports. The carry-over of 8.3 million bushels on July 1, 1949 may be reduced by about half by the end of the marketing year.

Rice -- The United States rice crop in 1949 at 89.6 million bushels was 10 percent larger than the previous record of 81.2 million bushels harvested in 1948, and 42 percent larger than the 1938-47 average of 62.9 million. Rice supplies are the largest on record. Prices to growers for the new crop are sharply lower than a year earlier and retail prices probably will decline. If so, domestic rice consumption might increase somewhat.

Corn -- The record large corn supply for the 1949-50 season, about 13 percent larger than the big 1948-49 supply, will again provide more than enough corn for all domestic requirements and probable exports. Commercial supplies are expected to be adequate to meet the requirements of food processors and other purchasers at prices averaging below the 1949 loan rate recently announced at $1.40 per bushel. The quantity of corn used for food products in 1949-50 will depend to a large extent on the demand for these products by consumers during the coming year. Demand for food products from corn has declined in recent years from the high immediate postwar level. In 1948-49 the volume of corn processed into food products was about the same as in 1947-48, although prices of corn and the corn products were considerably lower. The production of principal foods manufactured from corn is expected to continue at about the level of the past year. Wholesale prices of corn meal, sirup, and sugar in September were 10-20 percent lower than a year earlier when prices had not yet adjusted fully to the big 1948 corn supply. During 1950 prices of corn products may average a little lower than during 1949. Corn prices are currently a little lower than a year earlier and probably will continue lower, at least through this winter and spring.

Oats and barley -- Supplies of oats and barley, while smaller than in 1948-49, are above the prewar (1937-41) average and are generally adequate for domestic needs during the 1949-50 season. Wholesale prices of these grains have been advancing in recent months, although in September they were still a little lower than a year earlier. At least the usual seasonal increase is in prospect for oats and barley prices from the summer low to next spring. The wholesale price of barley malt is currently about 20 percent lower than a year ago, and probably will continue a little lower this fall and winter.

Exports of corn, oats, and barley are expected to continue fairly large during the 1949-50 season, although they probably will not total as large as in 1948-49. Exports of 1949 corn are expected to total around 100 million bushels, a little smaller than the heavy exports in 1946-47 and 1948-49.

Sugar

Demand for sugar in 1950 is not expected to be much different from that in 1949 at the present level of prices. Prospective domestic and foreign supplies are sufficient to meet the demand. Domestic consumption of refined sugar in 1949 is likely to be within the range of 90-95 pounds per person. This compares with the estimated per capita consumption of almost 96 pounds in 1948, 91 in 1947, and 97 in 1935-39.

Based on October 1 crop estimates, 1949-50 domestic sugar crops may yield about 8 percent more sugar than those of 1948-49, assuming average sugar recovery. The increase in domestic production of cane sugar may be about 15 percent larger than in 1948-49, while beet sugar output may be up almost 5 percent.

Total sugar production in the major areas supplying U. S. needs is expected to be about 5 percent less during the 1949-50 crop year than for 1948-49. Present reports indicate an output of about 10.1 million tons for the U. S. insular areas, Cuba, and the Philippine Islands. This production would still be the fourth largest on record, surpassed only by output in the current and preceding two seasons, and 22 percent above prewar. World sugar production in 1949-50, however, may be about the same as the large crop of 1948-49, with an expected cutback in Cuban production being partly offset by increased output in Europe and certain other areas.

Under the provisions of the Sugar Act of 1948, the Secretary of Agriculture determines in December of each year the amount of sugar needed to meet the requirements of consumers in the continental U. S. for the succeeding calendar year. This estimate is arrived at after analyzing supply and demand conditions, and may be adjusted during the year. Quotas are established under the Act for both domestic and foreign areas supplying the U. S. market.

THE WORLD FOOD PROSPECTS FOR 1949-50 1/

World food production during 1949-50 may be slightly smaller than a year earlier. However, carry-over stocks of food are larger and much progress has been made in the rehabilitation of the food distribution system in many of the war devastated areas. As a result, the improvement that occurred in the per capita food consumption rate in 1948-49 is expected to be maintained. With an increase in the output of livestock products in prospect, diets may be further improved nutritionally.

Production of most food crops in 1949-50 is expected to be slightly lower than in the preceding year. The output of bread grains --principally wheat and rye -- has been tentatively estimated at 204 million long tons, about 4 percent lower than in 1948-49. The world rice crop may be from 2 to 4 percent less than a year ago, with most of the decline occurring in Asia, where climatic conditions so far during the growing season have been less favorable than in 1948-49. Fewer potatoes will be produced in the North American continent and in Europe this year. However, the decline in potato output may not affect materially the quantity used as food.

The 1949-50 sugar crop may be about the same as the large crop a year earlier, and supplies are likely to be adequate for consumption needs. A decline in output may occur in some of the larger commercial producing areas such as Cuba, but production is increasing in Europe. Vegetable oil production is expected to show some improvement over 1948-49 with the result that the quantities entering into international trade channels are likely to increase. The year 1948-49 was one of the best of the postwar years for the production and international trade in vegetable oils. The fruit crops harvested in most of the countries in North America and Europe were large. The output of olives in the Mediterranean area, much of which is usually crushed for oil, is expected to be considerably larger than the small crop a year ago.

Food consumption in Europe improved significantly during 1948-49 as a result of marked expansion in production and the continued large imports of food. Except in a few countries, average consumption -- measured in terms of calories -- equalled the prewar level even though per capita supplies of meats, fats and sugar remained below.

1/ Prepared by the Office of Foreign Agricultural Relations.

For 1949-50, with production slightly lower than a year earlier, plans for any further improvement in the per capita food consumption rate depend on whether the original import programs of the countries participating in the European Recovery Program are realized. This is not likely since the import programs will no doubt have to be cut. However, imports may remain high enough to maintain consumption at the 1948-49 rate.

Production of foods and animal feeds in Europe is expected to be almost as large as in 1948-49 but from 5 to 10 percent below prewar average output. Crop production may be somewhat smaller than last year but the output of livestock products is expected to show some improvement. Per capita production of food, however, will be substantially below prewar since the population has increased.

In the Soviet Union, the 1949 crop of small grains and potatoes was adversely affected by unfavorable weather conditions during the growing season, particularly by excessive rainfall in many regions during the summer months. However, the output may be somewhat larger than last year because of the increase in acreage planted to these commodities, but below the prewar average production by 10 percent or more. Sugar beets are currently being harvested and a good crop is indicated. The food situation in the Soviet Union has recently shown noticeable improvement compared with the severe stringency which prevailed during the war and early postwar years.

All of the countries in the Middle East area except Turkey and Iran report normal or even better than average food crops for the 1949-50 year. In the two countries indicated, the abnormally low cereal output resulted from the early occurrence of severe cold weather in 1948-49 which interfered with the planting of the winter cereal crop. As a result, both Turkey and Iran, normally self-sufficient in cereals, now find it necessary to import wheat. The former has ordered about 400,000 long tons from Canada and the United States; Iran is importing 120,000 tons from Canada and the United States, 20,000 tons from Iraq and Afghanistan, and has just completed a trade agreement with the U.S.S.R. for 100,000 tons.

In the Far East the continuation of military and political disturbances has been a serious hindrance to the expansion of food production. Rapid population increases have reduced further the per capita amount of food available for consumption. The continuation of large food imports appears to be the only means of avoiding widespread suffering in this part of the world during 1949-50. In several of the areas which normally have food products to export, production has been reduced

to such an extent that the output is only about equal to local needs. Present indications are that several of the surplus rice producing countries will have less rice available for export than in 1948-49. Floods and drought in some parts of China have been partly offset by better than average crops in other areas. Food production in China is very spotted, geographically, and with the poor distribution facilities there are likely to be many areas which will suffer acute food shortages before the 1950 crops become available.

In the British dominions of the Southern Hemisphere food crop production for distriubtion in 1949-50 probably will be lower than in the 2 preceding years because of below-normal rainfall. A very gradual rise in the output of livestock products is occurring both in Australia and New Zealand. Livestock herds, particularly sheep, are being increased. In the Union of South Africa, on the other hand, drought conditions have severely affected pasture lands. This has resulted in a heavy slaughter of livestock and export of meat which is temporarily in surplus in this area. The reduction in livestock numbers, however, is expected to be followed by a serious shortage of meat in the next few months.

Food production in many Latin American countries during 1949 promises to be higher than in the year earlier, although there are some important exceptions in countries producing surpluses for export. The 1949 Argentine grain output was well below 1948, but wheat seedings for the current season are reported to be 10 percent above the small acreage planted in 1948. In practically all countries where supplies were available, consumption has continued at a high level and in many instances exports have been restricted to insure adequate food supplies for the domestic market. On the other hand, import controls are being used to conserve hard currency exchange, thus causing shortages of food products which are normally supplied from abroad.

Because of the shortage of foreign exchange, there is a general movement through most Latin American countries to attain a larger degree of self-sufficiency in food products. This trend promises to continue, even though production is often proving uneconomical and causing consumers to pay considerably more than the world market price for their food supplies. Coffee exports provide the principal source of dollar exchange and are expected to continue at record levels during the current consumption year. Cuba,with a high value of sugar exports, has been able to import relatively adequate supplies of deficit food products. Exports of some Latin American countries to soft currency areas are being maintained largely through bilateral agreements.

DISTRIBUTION OF UNITED STATES FOOD SUPPLIES 1948-49 1/

The continued high level of food production in the United States in 1948-49 made possible:

(1) Civilian per capita food consumption in the fiscal year 1948-49 10 percent above the 1935-39 average.

(2) Record exports of more than 49.5 billion pounds -- almost 15 percent higher than the previous record of more than 43.3 billion pounds established in the preceding year. A new record in food exports has been made in each successive postwar year beginning 1945-46.

U. S. civilian per capita food consumption high in 1948-49:

Even with a substantial increase in food exports from the 1947-48 fiscal year total civilian per capita consumption of food in the United States remained well above the prewar level, although lower than in the three preceding fiscal years (table 5). A number of factors apparently combined to bring about the decline in per capita consumption.

Domestic demand for food was less strong as a result of slight decreases in total economic activity, employment and the flow of income to consumers. A slightly larger proportion of consumer income was spent on major consumer durable goods -- particularly automobiles -- and consumer services, including rent, rather than on such items as food. Furthermore, the supplies of some foods which rank high in consumer preference in the United States, as for example, meats, and fresh and processed fruits and vegetables, were reduced by lower production, not by exports. In fact, most of the foods exported - wheat, flour, and other grains and grain products representing 80 percent of the total -- were in such plentiful supply in this country that farm prices were at or below the Government mandatory price support level. Total stocks of wheat increased 5,424 million pounds during fiscal year 1948-49, and stocks of corn by 46,083 million pounds.

More butter, cheese, eggs and fresh vegetables were consumed in 1948-49 than in the preceding fiscal year. Decreases in consumption compared with 1947-48 were indicated for most of the other foods.

Compared with average prewar consumption (1935-39) civilians consumed in 1948-49 more meat, dairy products other than butter, eggs, processed fruits, fresh and processed vegetables, lard and margarine.

1/ Prepared by the Bureau of Agricultural Economics, the Production and Marketing Administration and the Office of Foreign Agricultural Relations.

The largest relative declines were noted for corn products, rice, and potatoes and sweetpotatoes.

U. S. civilians took over 80 percent of food distributed in 1948-49:

On a physical quantity basis, United States civilians took 82.3 percent of the total amount of United States food distributed during the fiscal year 1948-49 (table 6). Exports (including military shipments of food to occupied areas) accounted for 16.2 percent, U. S. military services took 1.1 percent for troops stationed at home and abroad, and the noncontiguous territories of the United States received 0.4 percent.

For some commodities such as meat, U. S. civilians consumed practically all of the supplies. Civilians took 97.1 percent of the Nation's meats in 1948-49; U. S. military agencies, 2.4 percent; U. S. territories, 0.2 percent; and exports, 0.3 percent.

Among the other important commodities, U. S. civilians took more than 85 percent of the edible fats and oils (including butter) distributed, almost 98 percent of both vegetables and eggs, over 90 percent of the fruits, more than 85 percent of the cheese and about 85 percent of the condensed and evaporated milk (combined).

New record high set in exports of food from the United States:

Total food exports of 49,321 million pounds in 1948-49 were approximately 15 percent larger on a tonnage basis than those of the preceding fiscal year, and still larger than exports made during the first two postwar years 1945-46 and 1946-47. This represents the fourth consecutive year in which a new record high has been established in food exports from this country. Financial gifts and loans by the United States Government to foreign nations have contributed significantly to supporting the record large volume of food exports from this country. In fiscal year 1948-49, from 55 to 60 percent of food exports[2/] from the United States were financed by gifts and loans.

Exports of cereal products including rice totaled 40,549 million pounds, 16 percent above 1947-48. Increases from last year also occurred for edible fats and oils. Declines were registered for meats and dairy products.

2/ Financing under the European Recovery Program, and for government and relief in occupied areas; excludes minor programs such as Greek-Turkish Aid financed by the United States. Data include a relatively small amount of exports of nonfood products such as live animals, animal feeds and inedible fats and oils.

Table 5.- Civilian per capita consumption of food, United States, fiscal years 1948-49, 1947-48, 1946-47 and 1945-46 and average 1935-39 1/

Commodity	Consumption per capita				
	Fiscal year 1948-49	Fiscal year 1947-48	Fiscal year 1946-47	Fiscal year 1945-46	Prewar Average 1935-39
	Index 1935-39 = 100				
Index of per capita food consumption of all foods 2/	110	113	116	116	100
	Pounds	Pounds	Pounds	Pounds	Pounds
Wheat flour and other wheat cereal products (grain equivalent)	196	201	202	207	220
Other grains and grain products -- total	43.9	44.3	47.1	50.1	47.7
Corn and corn products (grain equivalent) 3/	30.6	31.2	33.9	35.5	36.0
Oats, barley, and grain sorghums (grain equivalent) 4/	13.3	13.1	13.2	14.6	11.7
Rice (milled basis)	4.5	4.8	5.8	4.0	5.6
Fats and oils, edible -- total (product weight)	45.3	45.8	43.7	41.5	48.6
Butter (product weight)	10.4	10.2	11.5	10.6	16.7
Lard	12.5	12.9	11.8	12.2	11.0
Margarine (product weight)	5.7	5.9	4.2	3.6	2.9
Shortening and other edible fats and oils	16.7	16.8	16.2	15.1	18.0
Meats (carcass weight equivalent) 5/	145.1	150.8	154.5	155.5	126.2
Dairy products:					
Fluid milk and cream 6/	375	390	395	436	340
Cheese	7.1	6.8	7.2	6.2	5.5
Condensed and evaporated milk	19.8	21.2	19.0	17.8	16.7
Dried milk	3.2	3.7	3.0	3.6	2.0
Other foods:					
Potatoes and sweetpotatoes	117.7	136.8	140.9	146.7	152.4
Dry beans and peas	8.3	8.7	8.9	7.5	9.3
Sugar, beet and cane (refined)	94.4	96.3	79.5	67.8	97.0
Eggs (shell equivalent)	47.8	47.4	47.3	47.3	37.3
Fruits -- total	165	182	193	174	163
Fresh (farm weight)	123	138	148	132	138
Processed (product weight)	41.6	43.7	45.4	41.5	25.4
Vegetables - total (excl. potatoes and sweetpotatoes)	293	294	311	309	265
Fresh (farm weight)	253	252	265	262	235
Processed (product weight) 7/	39.8	42.2	45.9	47.4	30.3
Peanuts (farmers stock equiv., excl. oil)	6.6	7.0	8.3	9.9	6.7
Soybeans (excluding oil)	.8	.7	1.2	1.1	8/
Miscellaneous 9/	211.9	218.7	234.9	249.1	185.3

1/ Data prior to 1948-49 are revised to correspond with those in "Consumption of Food in the United States, 1909-48" U.S.D.A. Miscellaneous Publication No. 691. 2/ Weighted by average retail prices for 1935-39. 3/ Excludes quantities consumed as corn sugar, corn sirups, and alcoholic beverages. 4/ Includes grain equivalent of oatmeal and rye flour; excludes grains used for alcoholic beverages. 5/ Excludes offals. 6/ In other tables of this report, fluid milk and cream are included with "other foods -- miscellaneous". 7/ Excludes canned baby foods and soups. 8/ Less than .05 pounds. 9/ Includes meat offals, poultry, fish, corn and maple sugars, sirups, honey, dairy products (not elsewhere specified), coffee, tea, cocoa, canned baby foods and soups, etc.

Table 6.- Distribution of United States food supplies: U. S. civilian, U. S. military, U. S. territories, and exports, fiscal year, 1948-49

Commodity	Total food distribution 1/	Percentage of total food distribution			
		U.S. civilians	U.S. military	U.S. territories 2/	Exports 3/
	Mil. lb.	Percent	Percent	Percent	Percent
Total food	305,527	82.3	1.1	.4	16.2
Wheat and wheat products (grain equiv.)	59,448	48.5	.6	.3	50.6
Other grains--total (grain equiv.)	16,112	40.2	.1	.4	59.3
Corn and corn products	9,793	46.0	.1	.5	53.4
Barley, oats, rye and grain sorghums	6,319	31.1	.1	.4	68.4
Rice (milled basis)	1,947	35.4	.7	17.1	46.8
Fats and oils, edible (incl. butter)	7,728	86.4	1.1	1.0	11.5
Meats (carcass weight equiv.)	22,016	97.1	2.4	.2	.3
Dairy products (product weight)					
Cheese	1,207	86.5	1.0	.4	12.1
Condensed and evaporated milk	3,440	84.7	2.3	.9	12.1
Dried milk	785	59.4	1.1	2.0	37.5
Other foods:					
Potatoes and sweetpotatoes (farm weight equiv.)	19,832	87.5	1.8	.4	10.3
Dry beans and peas (including indirect uses)	1,623	75.5	2.0	3.1	19.4
Sugar (refined)	14,166	98.2	1.0	.1	.7
Eggs (shell equiv.)	7,237	97.4	1.3	.1	1.2
Fruits - total	26,295	92.9	1.4	.2	5.5
Fresh (farm weight)	19,054	95.1	.6	.1	4.2
Processed (product weight)	7,241	87.1	3.6	.5	8.8
Vegetables - Total (excluding potatoes and sweetpotatoes)	44,286	97.8	1.1	.2	.9
Fresh (farm weight)	37,883	98.5	.6	.1	.8
Processed (product weight)	6,403	93.5	4.5	.9	1.1
Peanuts (farmers' stock equiv., excluding oil) 4/	1,724	56.7	.3	--	43.0
Soybeans (excluding oil) 4/	1,831	6.7	--	--	93.3
Miscellaneous 5/	75,850	98.3	1.2	--	.5

1/ Equals production plus imports and carry-in stocks minus domestic nonfood use, duplication, and carry-out stocks. Data take into account U. S. military stocks accumulated prior to July 1, 1948 and used for civilian relief feeding programs in occupied areas during fiscal year 1948-49. 2/ Partly estimated. 3/ Includes exports of food by U. S. military for civilian relief feeding programs in occupied areas. 4/ Excludes quantities crushed in the United States for oil for domestic consumption and export; includes exports of (1) peanuts and soybeans for all uses, and (2) the bean equivalent of soya flour and meal. 5/ Includes meat offals, horsemeat, poultry, fidh, corn and maple sugars, sirups, honey, tree nuts, coffee, tea, cocoa, fluid milk and cream, other dairy products (not elsewhere specified), etc.

Table 7.- Summary of food exports from the United States, by major food groups, average 1935-39 and fiscal years 1945-46, 1946-47, 1947-48, and 1948-49

Period	Total food exports	Wheat and wheat products (grain equiv.)	Other grains (grain equiv.)	Rice (milled)	Fats and oils 1/	Meat (carcass equiv.)	Dairy products (product weight) 2/	Other food
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
1935-39 av.	9,460	3,060	2,991	186	195	123	38	2,867
1945-46	38,973	23,565	2,931	782	705	1,375	1,773	7,842
1946-47	42,948	23,901	9,330	860	509	405	1,107	6,836
1947-48	43,323	29,148	4,998	911	562	152	1,030	6,522
1948-49	49,521	30,084	9,553	912	889	73	857	7,153

1/ Includes butter.
2/ Excludes butter.

Grains, including rice, accounted for about 82 percent of the total export tonnage. Wheat and wheat products represented 61 percent; rice, 2 percent; and the other grains, 19 percent. These products were a larger proportion of exports in 1948-49 than they were in the preceding three fiscal years. This was partly because of plentiful supplies and partly due to the necessity of European countries to conserve their limited resources of dollars by purchasing grains and grain products which are high in food energy relative to their cost. In both 1946-47 and 1947-48 grain shipments abroad were restricted to food and seed uses. Grain exports for 1948-49 included quantities for use as animal feed.

Wheat and wheat products (grain equivalent) exports of 30,084 million pounds (over 501 million bushels) are the largest on record (table 8). They were almost 10 times the average annual exports for 1935-39. Exports accounted for slightly more than half of the total distribution of United States wheat for food use in 1948-49.

Exports of corn and corn products amounted to 5,234 million pounds (grain equivalent), more than twice the 1947-48 rate. These exports represented over half of the total distribution of corn for food use. The outmovement of barley and malt, grain sorghums, oats and oatmeal, rye and rye flour in 1948-49 totaled 4,319 million pounds (grain equivalent) -- 56 percent above the previous year's level and six times the prewar 1935-39 average. These exports in 1948-49 accounted for about two-thirds of the total use of these grains for food. Rice exports of 912 million pounds (milled basis) were equal to those of 1947-48. These exports, equivalent to almost 50 percent of the total distribution of United States supplies of rice for use as food, went principally to Cuba where rice is a particularly important item in the diet.

The milling by-products of the flour and other grain products remained in this country for feed use. A summary of grain and grain products exports follows:

Fiscal year 1948-49

Exported as grain:

	Million pounds	Million bushels
Wheat	22,512	375.2
Rice, rough	64	1.4
Corn	4,961	88.6
Rye	304	5.4
Oats	548	17.1
Barley	1,109	23.1
Grain sorghums	1,931	34.5
Total	31,429	545.3
Total excl. rice	31,365	543.9

Exports as grain products:

	Million pounds product weight	Million bushels grain equivalent
Wheat flour	5,552	125.0
Semolina	3	.1
Macaroni	35	.8
Rice, milled	871	
rough equiv.		29.8
Corn meal	48	1.5
Corn grits	27	.9
Corn starch	66	1.9
Oat meal	91	6.9
Malt	144	4.2
Total	6,837	171.1
Total excl. rice	5,966	141.3

Total, grain and grain products exports, excluding rice--685.2 million bushels, grain equivalent.

Fats and oils exports of 889 million pounds--less than 1 percent of which was butter--were almost 60 percent greater than in the preceding fiscal year, and more than four times the prewar (1935-39) average annual rate. Improvement in the domestic supply of vegetable oils and animal fats made possible the increase in the fats and oils exports over the 1947-48 total.

Meat exports of 73 million pounds (carcass equivalent) in 1948-49 were lower than those in each of the three preceding fiscal years and about 40 percent below the 1935-39 average annual rate. The volume of meat marketings in the United States was no larger than during the preceding fiscal year. Even though U. S. civilians took a larger proportion of the total, their consumption per person was down slightly.

Exports of cheese, canned milk and dried milk in 1948-49 totaled 857 million pounds. This was more than 15 percent below the total of the previous fiscal year and the smallest export in the four postwar years beginning 1945-46. Exports of these products in 1948-49 were more than 20 times those in 1935-39. Of the total distribution in 1948-49, exports accounted for 12 percent of the cheese, 38 percent of the dried milk, and 12 percent of the canned milk.

Aggregate exports of other foods -- principally fruits, vegetables, potatoes, dry edible beans and peas, soybeans and peanuts -- amounted to 7,153 million pounds, about 10 percent more than in 1947-48. Peanut and soybean exports were mainly for crushing for oil.

E.R.P. countries received most of United States food exports:

Most of the food exports from the United States went to countries participating in the European Recovery Program (table 9). These European countries received a total of 31,196 million pounds, 63.0 percent of the total food exports from the United States. Non-participating European countries received 207 million pounds (0.4 percent of the total exports); Far Eastern countries, 9,665 million pounds (19.5 percent); Canada and Newfoundland, 1,967 million pounds (4.0 percent); Latin American Republics, 4,560 million pounds (9.2 percent); and other areas, 1,926 million pounds (3.9 percent of the total exports).

The Bizone area of Germany received more of the foods exported from the United States than any other country. Most of these exports were financed through the Economic Cooperation Administration and funds appropriated to the U. S. military agencies for government and relief in occupied areas. The Bizone was the chief recipient of wheat and wheat products (7,635 million pounds), other grains and grain products (3,294 million pounds), fats and oils (159 million pounds) and "other foods" (3,021 million pounds). Relatively small quantities of dairy products and only a very minor quantity of rice were shipped there.

The Far East area under United States military control (i.e., Japan, Korea3/ and the Ryukyu Islands) was the second largest recipient of our food exports. The bulk of these shipments was wheat and wheat products (3,856 million pounds), other grains and grain products (1,271 million pounds), and "other foods" -- most of which were soybeans and soya products -- (671 million pounds).

3/ Korea was under U. S. military control until December 1948. In January 1949, Korea began to receive financial assistance through the Economic Cooperation Administration.

Other areas which received substantial quantities of food from this country in 1948-49 were Italy (4,225 million pounds), Austria (2,000 million pounds), Canada and Newfoundland (1,967 million pounds), France and French North Africa (1,866 million pounds), and the Netherlands (1,808 million pounds).

Exports by U. S. military for civilian relief abroad still significant:

Since the end of the war in 1945, exports of food financed by U. S. military agencies for civilian feeding in occupied areas abroad have been large. In 1948-49 these shipments represented 29 percent of the total food exports from the United States, the same relationship as in the preceding year, but larger than during 1945-46 or 1946-47.

On an individual commodity basis, exports to occupied areas under this program were also significant in 1948-49 accounting for the following proportions of their corresponding total exports: wheat and wheat products, 35 percent; barley, 60 percent; grain sorghums, almost 30 percent; dried milk (principally nonfat dry milk solids), 25 percent; dried fruits, 38 percent; dry edible beans and peas, each approximately 45 percent; honey, 85 percent; and soybeans (including soya products), 50 percent.

U. S. Department of Agriculture procured major part of foods exported in 1948-49:

Almost two-thirds of the total food exports were procured through the U. S. Department of Agriculture, either specifically for export programs or under price support operations. U. S. military agencies and countries receiving financial assistance through the ECS depended heavily upon the Department of Agriculture for procurement of many of the foods exported.

Among the major commodities, the Department of Agriculture bought about 80 percent of the wheat and wheat products exported; approximately 60 percent of the other grains and grain products; more than 80 percent of the peanuts and 90 percent of the potatoes (including the raw material equivalent of potato flour and starch); 85 percent of the honey; 65 percent each of the dried fruits and the eggs; and almost 55 percent of the dried milk.

Table 8.- Food exports from the United States, by major groups, fiscal years 1948-49, 1947-48, 1946-47 and 1945-46 and average 1935-39 1/

Commodity	Fiscal year 1948-49	Fiscal year 1947-48	Fiscal year 1946-47	Fiscal year 1945-46	Prewar average 1935-39
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
Total exports	49,521	43,323	42,948	38,973	9,460
Wheat and wheat products (grain equiv.) 2/	30,084	29,148	23,901	23,565	3,060
Other grains - total (grain equiv.)	9,553	4,998	9,339	2,931	2,991
Corn and corn products	5,234	2,234	6,704	1,268	2,296
Barley, oats, rye, and grain sorghums 3/	4,319	2,764	2,626	1,663	695
Rice (milled basis)	912	911	860	782	186
Fats and oils, edible (including butter)	889	562	509	705	195
Meats (carcass weight equivalent)	73	152	405	1,375	123
Dairy products (product weight)					
Cheese	146	104	158	299	1
Condensed and evaporated milk	417	563	638	1,083	31
Dried milk	294	363	311	391	6
Other foods:					
Potatoes and sweetpotatoes (farm weight equivalent)	2,044	1,013	900	1,633	116
Dry beans and peas (incl. indirect uses)	314	534	500	862	54
Sugar (refined)	98	243	557	792	195
Eggs (shell equivalent)	89	326	536	608	3
Fruits -- total	1,440	1,946	2,237	1,671	1,922
Fresh (farm weight)	802	1,071	1,410	1,044	1,197
Processed (product weight)	638	875	827	627	725
Vegetables - total (excl. potatoes and sweetpotatoes)	381	431	669	1,224	134
Fresh (farm weight)	307	260	473	937	92
Processed (product weight)	74	171	196	287	42
Peanuts (farmers' stock equiv., excluding oil) 4/	741	532	279	99	1
Soybeans (excluding oil) 4/	1,708	1,160	646	533	240
Miscellaneous 5/	338	337	512	420	202

1/ Excludes shipments to the noncontiguous territories of the United States. Data prior to 1948-49 are revised to correspond with those in "Consumption of Food in the United States, 1909-48" U.S.D.A. Miscellaneous Publication No. 691.

2/ Excludes exports of flour milled in bond.

3/ Includes malt, oatmeal and rye flour.

4/ Exports of peanut oil and soybean oil included with edible fats and oils, above. Soybeans includes bean equivalent of soya flour and meal exports.

5/ Includes meat offals, horsemeat, poultry, fish, corn and maple sugars, honey, treenuts, coffee, tea, cocoa, and fluid milk and cream.

Table 9.- Food exports from the United States, by destination, fiscal year 1948-49 1/

Destination	Total	Wheat and wheat products (grain equivalent)	Other grains and products 2/ (grain equivalent)	Rice (milled basis)	Fats and oils 3/	Meats 4/ (carcass weight)	Dairy products 5/ (product weight)	Other foods 6/
	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.
Total food exports	49,521	30,084	9,553	912	889	73	857	7,153
Europe - total 7/	31,403	19,926	5,920	56	605	18	487	4,391
ERP participating countries - total 7/	31,196	19,809	5,919	56	560	18	443	4,391
Austria	2,000	1,209	496	22	114	*	7	152
Belgium and Luxembourg	1,395	947	85	5	29	*	93	236
Denmark	375	0	318	2	7	*	*	48
France and French North Africa	1,866	717	702	*	37	1	33	376
Germany	14,186	7,635	3,294	*	159	8	69	3,021
Greece	1,649	1,347	127	20	21	3	78	53
Iceland	20	14	3	2	*	*	0	1
Ireland	635	224	397	0	1	0	*	13
Italy	4,225	3,939	23	*	87	*	29	147
Netherlands	1,808	1,417	260	*	19	*	6	106
Norway	698	525	166	0	0	*	*	7
Portugal	703	694	9	0	0	*	*	*
Sweden	9	7	0	*	1	*	0	1
Switzerland	646	556	30	5	16	*	3	36
Turkey	*	0	0	0	0	0	0	*
United Kingdom	981	578	9	*	69	6	125	194
Other European countries - total	207	117	1	*	45	*	44	*
Spain	19	0	1	0	18	0	*	*
U.S.S.R.	*	0	0	0	0	0	*	*
Other 8/	188	117	*	*	27	*	44	*
Far East - total	9,665	5,977	2,469	177	5	7	150	880
Philippines	943	460	84	85	3	7	106	198
China	330	248	*	81	*	0	1	*
India and Pakistan	2,545	1,412	1,113	0	*	*	9	11
Japan, Korea and Ryukyu	5,842	3,856	1,271	11	2	*	31	671
Thailand and Burma	5	1	1	0	*	*	3	*
Canada and Newfoundland	1,967	29	660	43	50	17	6	1,162
Latin American Republics	4,560	2,809	317	508	208	24	122	572
Other areas	1,926	1,343	187	128	21	7	92	148

1/ Excludes shipments to the noncontiguous territories of the United States.
2/ Includes corn and corn products (except corn sugar and corn sirup), barley and malt, oats, oatmeal, rye, rye flour, and grain sorghums. See table 10 for commodity details.
3/ Includes butter, lard, margarine, shortening, and other edible fats and oils.
4/ Meat offals and horse meat are included with "other foods".
5/ Includes cheese, condensed and evaporated milk, dried whole milk and non-fat dry milk solids. See table 11 for commodity details.
6/ Includes potatoes and sweetpotatoes, dry beans and peas, sugar, eggs, fresh and processed fruits and vegetables, peanuts, etc. See table 12 for commodity details.
7/ Includes French North Africa (i.e., Algeria, Tunisia and French Morocco) and Turkey.
8/ Albania, Bulgaria, Czechoslovakia, Finland, Hungary, Poland, Rumania and Yugoslavia.
* Less than 0.5 million pounds.

Table 10.- Exports of grains other than wheat and rice from the United States, by destination, fiscal year 1948-49 1/

Destination	Other grains - total (grain equiv.)	Corn and corn products 2/ (grain equiv.)	Barley and malt (grain equiv.)	Oats and oatmeal (grain equiv.)	Grain sorghums (grain equiv.)	Rye and rye flour (Grain equiv.)
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
Total exports	9,553	5,234	1,313	771	1,931	304
Europe - total 3/	5,920	3,841	371	623	782	303
ECA participating countries - total 3/	5,919	3,840	371	623	782	303
Austria	496	181	67	42	0	206
Belgium and Luxembourg	85	80	2	0	3	0
Denmark	318	289	9	20	0	0
France and French North Africa	702	423	39	220	20	0
Germany	3,294	2,103	147	251	716	77
Greece	127	40	40	47	0	0
Iceland	3	3	*	*	0	*
Ireland	397	397	0	0	0	0
Italy	23	4	3	16	0	0
Netherlands	260	122	59	16	43	20
Norway	166	155	0	11	0	0
Portugal	9	9	0	0	0	0
Sweden	0	0	0	0	0	0
Switzerland	30	25	5	*	0	0
Turkey	0	0	0	0	0	0
United Kingdom	9	9	0	0	0	0
Other European countries - total	1	1	*	0	0	0
Spain	1	1	0	0	0	0
U.S.S.R.	0	0	0	0	0	0
Other 4/	*	*	*	0	0	0
Far East - total	2,469	569	744	6	1,149	1
Philippines	84	61	18	5	0	0
China	*	0	*	0	0	0
India and Pakistan	1,113	102	0	*	1,011	0
Japan, Korea and Ryukyu	1,271	406	726	*	138	1
Thailand Burma	1	*	*	1	0	0
Canada and Newfoundland	660	637	7	16	*	*
Latin American Republics	317	27	178	112	*	*
Other areas	187	160	13	14	0	0

1/ Excludes shipments to the noncontiguous territories of the United States.
2/ Excludes corn sugar and corn sirup.
3/ Includes French North Africa (i.e., Algeria, Tunisia and French Morocco) and Turkey.
4/ Albania, Bulgaria, Czechoslovakia, Finland, Hungary, Poland, Rumania and Yugoslavia.
* Less than 0.5 million pounds.

Table 11.- Exports of dairy products from the United States, by destination, fiscal year 1948-49 1/

Destination	Total	Cheese	Condensed and evaporated milk	Dried milk
	Million pounds	Million pounds	Million pounds	Million pounds
Total exports	857	146	417	294
Europe - total 2/	487	139	170	178
ERP participating countries-total 2/	443	139	170	134
Austria	7	*	*	7
Belgium and Luxembourg	93	7	82	4
Denmark	*	0	0	*
France and French North Africa	33	1	13	19
Germany	69	1	3	65
Greece	78	5	56	17
Iceland	0	0	0	0
Ireland	*	0	*	0
Italy	29	*	16	13
Netherlands	6	*	*	6
Norway	*	*	0	0
Portugal	*	0	*	*
Sweden	0	0	0	0
Switzerland	3	*	*	3
Turkey	0	0	0	0
United Kingdom	125	125	*	*
Other European countries - total	44	0	*	44
Spain	*	0	0	*
U.S.S.R.	*	0	0	*
Other 3/	44	0	*	44
Far East - total	150	1	110	39
Philippines	136	1	102	3
China	1	0	*	1
India and Pakistan	9	*	4	5
Japan, Korea and Ryukyu	31	*	1	30
Thailand and Burma	3	0	3	*
Canada and Newfoundland	6	*	6	*
Latin American Republics	122	2	62	58
Other areas	92	4	69	19

1/ Excludes shipments to noncontiguous territories of the United States.
2/ Includes French North Africa (i.e., Algeria, Tunisia and French Morocco) and Turkey.
3/ Albania, Bulgaria, Czechoslovakia, Finland, Hungary, Poland, Rumania and Yugoslavia.
* Less than 0.5 million pounds.

Table 12.- Exports of other foods from the United States, by destination, fiscal year 1948-49 1/

Destination	Total other foods	Potatoes and sweet-potatoes	Dry beans and peas	Beet, cane and maple sugar (refined)	Eggs (Shell equiv.)	Fruits, total	Vegetables, total	Peanuts 2/	Soybeans 2/	Miscellaneous 3/
	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.
Total exports	7,153	2,044	314	98	89	1,440	381	741	1,708	338
Europe - total 4/	4,391	1,812	188	34	60	515	9	626	998	149
ERP participating countries -- total 4/	4,391	1,812	188	34	60	515	9	626	998	149
Austria	152	*	44	*	16	13	*	70	0	9
Belgium and Luxembourg	236	*	*	5	3	147	2	*	35	44
Denmark	48	0	0	*	*	3	*	3	42	*
France and French North Africa	376	*	1	*	*	6	*	167	200	2
Germany	3,021	1,790	122	13	17	143	1	318	561	56
Greece	53	22	17	9	*	1	2	0	0	2
Iceland	1	0	1	*	*	*	*	0	*	0
Ireland	13	0	1	*	*	7	*	0	0	5
Italy	147	*	*	7	*	8	*	64	65	3
Netherlands	106	0	*	*	*	8	*	4	87	7
Norway	7	0	*	*	*	*	*	0	7	*
Portugal	*	0	*	*	*	*	*	0	0	*
Sweden	1	0	*	*	*	*	*	0	1	*
Switzerland	36	*	*	*	4	21	3	*	*	8
Turkey	*	0	0	0	*	0	0	0	0	*
United Kingdom	194	0	2	*	20	158	1	*	*	13
Other European countries -- total	*	0	*	*	*	*	*	0	0	*
Spain	*	0	*	*	*	0	0	0	0	*
U.S.S.R.	*	0	*	0	*	0	*	0	0	*
Other 5/	*	0	*	*	*	*	*	0	0	*
Far East - total	880	27	36	5	*	48	38	48	580	98
Philippines	198	25	2	1	*	48	34	1	2	85
China	*	0	0	*	*	*	*	0	0	*
India and Pakistan	11	0	0	*	*	*	*	*	*	11
Japan, Korea and Ryukyu	671	2	34	4	*	*	4	47	578	2
Thailand and Burma	*	0	0	*	*	*	0	0	0	*
Canada and Newfoundland	1,162	33	8	16	*	671	216	64	130	24
Latin American Republics	572	164	78	15	25	148	99	1	*	42
Other areas	148	8	4	28	4	58	19	2	0	25

1/ Excludes shipments to the noncontiguous territories of the United States.
2/ Excluding oil; soybeans include bean equivalent of soya flour and meal.
3/ Includes meat offals, horsemeat, poultry, fish, corn and maple sugar, sirups, honey, tree nuts, coffee, tea, cocoa, and fluid milk and cream.
4/ Includes French North Africa (i.e., Algeria, Tunisia and French Morocco) and Turkey.
5/ Albania, Bulgaria, Czechoslovakia, Finland, Hungary, Poland, Rumania and Yugoslavia.
* Less than 0.5 million pounds.

Table 13.- Production of major food commodities, calendar years, 1935-39 average, 1946, 1947, 1948, and preliminary estimates for 1949 with percentage comparisons 1/

Commodity	Unit	Average 1935-39	1946	1947	1948	1949 Prel.	1949 as a percentage of 1935-39	1949 as a percentage of 1948
Meats (carcass weight)								
Beef	Mil.lb	6,937	9,373	10,428	9,181	9,600	138	105
Veal	do	1,038	1,440	1,599	1,419	1,300	125	92
Lamb and mutton	do	870	970	802	753	610	70	81
Pork (excluding lard)	do	7,337	11,173	10,601	10,246	10,660	145	104
Total meats	do	16,182	22,956	23,430	21,599	22,170	137	103
Fish (edible weight)								
Fresh and frozen	do	615	759	754	2/	2/	-	-
Canned 3/	do	337	464	483	2/	2/	-	-
Cured	do	74	63	63	2/	2/	-	-
Total fish	do	1,026	1,286	1,300	2/	2/	-	-
Poultry and eggs								
Eggs	Mil.doz	3,335	5,098	5,065	5,057	5,097	153	101
Chicken (dr. wt.)	Mil.lb	2,327	3,597	3,497	3,268	3,834	165	117
Turkey (dr. wt.)	do	350	687	606	509	675	193	133
Dairy products								
Total milk 4/	do	106,450	122,539	121,891	118,337	119,826	113	101
Cheese 5/	do	669	1,101	1,178	1,097	1,190	178	108
Cond. and evap. milk	do	2,225	3,333	3,630	3,831	3,295	148	86
Fats and oils								
Butter, farm & factory (actual weight)	do	2,170	1,505	1,646	1,513	1,675	77	111
Lard 6/	do	1,630	2,138	2,427	2,368	2,630	161	71
Margarine (fat content)	do	303	465	606	735	680	224	93
Shortening	do	1,529	1,451	1,374	1,426	1,448	95	102
Other edible fats and oils 7/	do	575	677	1,070	1,257	1,614	281	128
Total fats and oils 8/	do	6,207	6,236	7,123	7,299	8,047	130	110
Fruits								
Fresh:								
Citrus	do	6,875	9,296	9,992	8,681	7,658	111	88
Apples (commercial)	do	4,385	3,936	3,937	3,275	4,320	99	132
Other (excl. melons)	do	4,703	5,573	5,513	4,511	5,539	118	123
Processed:	do							
Canned fruit	do	1,705	3,094	9/2,643	2,514	2,500	147	99
Canned fruit juices	do	333	2,442	2,205	2,536	1,991	598	79
Frozen	do	106	525	9/ 353	400	425	401	106
Dried	do	1,118	1,014	1,153	890	1,058	95	119

- Continued

Table 13.- Production of major food commodities, calendar years, 1935-39 average, 1946, 1947, 1948, and preliminary estimates for 1949 with percentage comparisons 1/ - Continued

Commodity	Unit	Average 1935-39	1946	1947	1948	1949 Prel.	1949 as a percentage of 1935-39	1949 as a percentage of 1948
Vegetables								
Fresh 10/	Mil.lb	30,520	38,946	35,839	37,727	36,058	118	96
Canned 11/	do	4,030	7,640	9/6,130	5,811	5,500	136	95
Frozen	do	12/ 78	450	346	446	455	583	102
Potatoes	Mil.bu	355	483	389	446	379	107	85
Sweetpotatoes	do	68	66	56	50	52	76	104
Dry edible beans 13/	Mil.lb	1,360	1,474	1,604	1,955	1,890	139	97
Canned baby foods	do	48	462	9/ 368	527	540	1,125	102
Sugar, raw basis	1,000 sh.tons	1,948	1,900	2,158	2,917	2,125	109	111
Grains								
Wheat	Mil.bu	759	1,153	1,367	1,288	1,129	149	88
Rye	do	44.9	18.9	26.0	26.4	18.8	42	71
Rice, milled	Mil.lb	1,340	2,044	9/2,189	2,290	2,389	178	104
Corn, grain only	Mil.bu	2,050	2,951	2,137	3,365	3,200	156	95
Oats	do	1,045	1,498	1,199	1,492	1,314	126	88
Barley	do	239	262	281	317	233	97	74
Peanuts	Mil.lb	1,229	2,038	2,183	2,338	1,804	147	77

1/ Calendar year basis except for fresh citrus fruit for which the season begins in the fall of the previous year; dried fruits which are on a pack-year basis; rice on a marketing year. 2/ Not available. 3/ Excludes canned food products containing small quantities of fish such as clam chowder, etc. 4/ Includes total farm production of milk and off-farm production. 5/ Excluding full skim, cottage, pot, and bakers' cheese. 6/ Including amount used in manufactured food and nonfood products. 7/ Represents fats used in cooking and salad oils, salad dressing, mayonnaise, bakery products and other minor uses such as fish canning. 8/ Fat content basis except for butter which is on an actual weight basis. 9/ Revised. 10/ Estimates of all vegetables and melons other than potatoes and sweetpotatoes include reported commercial production for fresh market shipment plus rough estimates of quantities produced in market gardens for fresh sale and farm gardens for home use. Excludes town garden production. 11/ Includes asparagus, beans (lima), beans (snap), beets, carrots, corn, hominy, kraut (including bulk), peas, pickles (including bulk), pimientos, Irish potatoes, sweetpotatoes, pumpkin and squash, tomatoes, tomato pulp and tomato juice, tomato sauce, paste, and catsup and chili sauce, mixed vegetables. 12/ Average 1937-39. Data prior to 1937 are not available. 13/ Cleaned basis.

Table 14.- Retail food prices and total consumer price index, United States 1940-46 and 1947-48 by months
(Index numbers 1935-39=100)

Year and month	Meats 1/	Eggs	Dairy products 2/	Fats and oils 3/	Cereals and bakery products	Fruit and vegetables: Fresh	Fruit and vegetables: Canned	Fruit and vegetables: Dried	Sugar and sweets	Beverages	All foods	Consumer price index
1940	96	94	101	82	97	97	92	101	97	92	97	100
1941	108	112	112	94	98	104	98	107	106	102	106	105
1942	126	136	125	120	105	133	122	136	126	122	124	116
1943	134	162	135	126	108	178	131	159	127	125	138	124
1944	130	153	134	123	108	177	130	166	126	124	136	126
1945	131	164	134	124	109	188	130	168	126	125	139	128
1946	161	169	165	152	125	191	141	190	144	140	160	139
1947	217	201	186	198	155	202	166	264	180	187	194	159
Jan.	199	182	190	202	143	184	174	269	176	178	184	153
Feb.	197	170	183	201	144	189	173	270	178	183	182	153
March	208	175	188	219	148	199	173	271	179	187	190	156
April	203	176	179	228	153	201	173	270	179	190	188	156
May	204	179	172	200	154	210	172	268	179	189	188	156
June	217	183	172	188	155	208	170	263	180	181	190	157
July	220	203	179	182	155	204	168	264	180	181	193	158
Aug.	228	212	184	178	156	202	166	263	180	182	196	160
Sept.	241	236	195	177	158	202	157	261	181	187	204	164
Oct.	236	233	190	190	160	201	155	256	182	191	202	164
Nov.	227	225	198	196	168	205	156	252	183	195	203	165
Dec.	227	236	205	208	170	212	158	255	184	198	207	167
1948	246	209	205	196	171	212	158	247	174	205	210	171
Jan.	238	214	206	209	173	216	158	257	183	202	210	169
Feb.	225	189	204	194	172	222	158	256	177	204	205	168
March	225	186	201	192	171	214	158	254	174	204	202	167
April	234	185	206	191	171	228	156	252	174	204	208	169
May	244	185	205	197	171	229	156	250	173	205	211	170
June	255	194	206	200	171	225	157	248	171	205	214	172
July	262	204	209	201	171	223	158	248	171	205	217	174
Aug.	267	220	211	198	171	205	158	249	172	205	217	174
Sept.	265	227	209	197	171	200	159	249	173	206	215	174
Oct.	256	239	203	193	170	197	159	238	173	206	212	174
Nov.	247	244	200	189	170	192	159	231	173	206	208	172
Dec.	241	217	199	184	170	196	159	230	173	208	205	171
1949												
Jan.	236	210	196	175	170	213	159	228	173	209	205	171
Feb.	221	180	192	160	170	225	159	225	174	209	200	169
March	230	180	190	155	170	226	158	228	176	208	202	170
April	234	184	185	150	170	232	157	228	176	208	203	170
May	232	191	183	144	170	235	156	228	176	207	202	169
June	241	198	182	143	170	231	155	227	176	208	204	170
July	236	204	182	141	170	221	154	228	176	208	202	168
Aug.	240	222	185	144	169	211	150	230	176	209	203	169

Index numbers from Bureau of Labor Statistics and rounded to the nearest whole number by Bureau of Agricultural Economics.
1/ Includes chicken and fish. 2/ Includes butter. 3/ Excludes butter.

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